

## Report 4: Interim Evaluation

Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games

FINAL REPORT – November 2012

For:  
Department for Culture, Media and Sport

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# 1 Introduction

## 1.1 Background

The London 2012 Olympic Games and Paralympic Games ('the Games' or '2012 Games') was one of the largest events ever hosted in the UK. A key element of London's bid was the commitment that the Games would result in a lasting legacy for the whole of the UK.

The Department for Culture, Media and Sport (DCMS) has commissioned a consortium led by Grant Thornton, including Ecorys, Loughborough University and Oxford Economics to undertake a comprehensive and robust 'meta-evaluation' of the additionality, output, results, impacts and associated benefits of the investment in the 2012 Games. The Economic and Social Research Council (ESRC) has part funded this project to enable it to make a contribution to advancing meta-evaluation methods.

The meta-evaluation consists of four phases:

- Phase 1: Inception (March 2010 – April 2011);
- Phase 2: Baseline and pre-Games interim evaluation (February 2011 – Summer 2012);
- Phase 3: Post-Games initial evaluation (June 2012 – Spring 2013);
- Phase 4: Longer-term evaluation of the impacts and legacy of the Games.

It is planned that Phase 4 of the work, looking at the longer-term impacts and legacy of the Games, will be commissioned separately at a later date and cover the impacts up to 2020.

This report (Report 4) is the fourth in a series of five reports, which cover phases 1 to 3 of the meta-evaluation:

- Report 1: Scope, research questions and data strategy;
- Report 2: Methods;
- Report 3: Baseline and counterfactual;
- Report 4: Pre-Games interim evaluation;
- Report 5: Post-Games initial evaluation.

The work undertaken in Reports 1 to 3 has been of critical importance in providing the foundations for this report as it has established – among other things – the research questions the study is tasked with answering, the approach and method taken to gathering the evidence and the context against which the impact of the legacy should be measured and evaluated. This report builds directly on these foundations and takes a first, and early, look at the impacts and legacy emerging from pre-Games activity. Report 5 will be published in 2013 and examine available evidence of the impacts and legacy post-Games up to the end of 2012.

## 1.2 Report 4

This report examines available evidence of the impacts and legacy that has emerged from activity taking place in the pre-Games period. It draws on a wide range of available sources of evidence including monitoring and output data, evaluations and research undertaken by other organisations and individuals and primary research commissioned or undertaken directly by the meta-evaluation team. Chapter 2 provides more detail on the evidence base, particularly how it was developed and how it has been used.

As noted, this report focuses on the impact and legacy of pre-Games activity and does not, in the main, cover the impact and legacy of Games-time activity.<sup>1</sup> The cut off point for the inclusion of data in this report was June 2012 (with a few minor exceptions) and therefore, it only provides an initial assessment of impacts and legacy of pre-Games activity – largely due to time-lags in available data. Report 5 will provide a more complete picture.

This report is therefore an initial assessment of the emerging legacy from the 2012 Games for each of the four legacy themes, primarily setting out what has already been achieved and delivered. Where possible it also provides a sense of direction and scale in terms of what can be expected post-Games over the medium and longer term.

### 1.3 Report structure

This report has been structured so that it can be read in full or as individual themes and sub-themes. For those taking the latter approach, it is useful to first review the methodological approach set out in Chapter 2 as this describes the rationale for the theme and sub-theme structure. The remainder of the report is set out as follows:

- Chapter 3 focuses on **harnessing the UK's passion for sport** looking in turn at the legacy effects on sports participation, sports infrastructure, elite sport and international sport.
- Chapter 4 is focused on **exploiting opportunities for economic growth** covering the economic impact of construction expenditure, business access to 2012 opportunities, promoting the UK as a place to invest, export and trade promotion, tourism, employability and skills development, promoting sustainable business and opportunities for disabled people in business and disabled access to transport.
- Chapter 5 is focused on **promoting community engagement and participation** which includes an assessment of the legacy effects on volunteering and social action, participation in culture, engaging children and young people, encouraging sustainable living and influencing attitudes towards disabled people.
- Chapter 6 focuses on the extent to which the 2012 Games are **driving the regeneration of East London** looking at how it has contributed to transforming place, transforming communities, transforming prospects and Convergence.
- The final chapter (Chapter 7) draws together the emerging findings as it provides a synthesised **summary of the legacy pre-Games**.

In addition, there are a number of appendices that provide further analysis and detail which supplements the information contained in the chapters above. Where relevant these appendices are signposted within the report.

<sup>1</sup> The only exception to this is the analysis of medal performance included in Chapter 3.

## 2 Method

This chapter summarises the methodological approach taken in preparing this report and synthesising the evidence. It provides an overview of the approach, the process of gathering the evidence and the future availability of evidence. The over-arching methodological approach to the meta-evaluation is set out in more detail in Reports 1 and 2.<sup>2</sup>

### 2.1 Overview of the approach

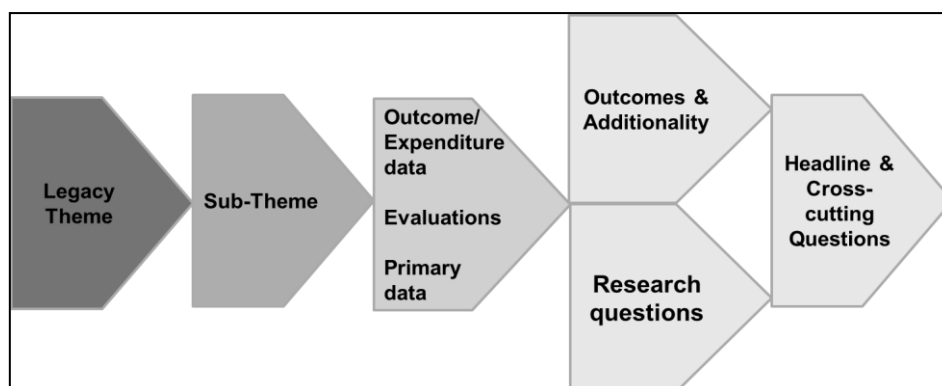
Figure 2-1 provides an illustration of the methodological approach adopted for this pre-Games interim evaluation. As can be seen from the diagram (working from left to right and as noted in the introduction) our analysis and reporting has been structured by the four legacy themes and then further broken down by legacy sub-themes. This headline structure has guided all of our previous work to date.

For each sub-theme we have then sought to analyse the evidence available by 'type', with three broad types of evidence used:

- Output and expenditure data;
- Evaluation and other research evidence;
- Primary research.

In undertaking the analysis and synthesis we were mindful of the differences between the different types of evidence and data. Our approach has enabled us to analyse parallel forms of evidence separately and as such has helped to avoid any confusion that may have been created by attempting to synthesise different types of evidence. The amount and type of evidence available differs within themes and sub-themes.

**Figure 2-1: Illustrative example of the methodological approach adopted**



With the evidence analysed separately by type, the next step was to triangulate the evidence to begin to draw some conclusions. This process was done in the following two ways, with the focus on higher level inferences and interactions between the different evidence types:

- The first approach was to draw the different sources of evidence together and to comment on what the evidence was inferring around the outcomes for the relevant sub-theme and the additionality of the Games in driving them. In order to robustly comment on outcomes and additionality we drew heavily on the baselines and counterfactuals described in Report

<sup>2</sup> See [www.culture.gov.uk/what\\_we\\_do/research\\_and\\_statistics/7605.aspx](http://www.culture.gov.uk/what_we_do/research_and_statistics/7605.aspx)

3 of the meta-evaluation.<sup>3</sup> In reading, this report (Report 4) a general rule of thumb that can be adopted is that unless stated otherwise the projects, activities and investments reported can be assumed to be additional and delivered as a direct result of the 2012 Games.

- The second approach was to draw the different sources of evidence together to begin to provide answers to the various research questions that were established at the outset of the meta-evaluation.<sup>4</sup> This occurred in a number of ways. For some research questions a number of different evidence sources – within a particular sub-theme – helped in providing an answer, whereas for others an answer was wholly reliant on only one evidence source. There were also some sources of evidence that were particularly useful for helping to answer a number of different research questions, both those within the same sub-theme as well as those outwith. Finally, there were also some research questions for which it was not possible to provide a full answer, either because relevant evidence was not available or because they are focused on a longer timescale and effectively 'out of scope' for this pre-Games interim report.

The final stage involves synthesis of the findings across the themes in order to draw some overall conclusions with regard to the pre-Games legacy of the 2012 Games, through answering the headline and cross-cutting research questions (see Chapter 7).

## 2.2 Gathering the evidence

The intention from the outset of the meta-evaluation was that it would draw primarily on evaluation evidence, although some resource was allocated to help fill gaps in the available data. In practice, and as expected with a meta-evaluation of this scale, the approach to gathering the evidence has been complex, but can be broadly summarised as follows:

- **Output and Expenditure Data:** Given potential gaps in the evidence base (see below), the decision was taken that it would be prudent to also collect output and expenditure data for key legacy projects and programmes as this, in the absence of evidence of outcomes and impacts, would at the very least provide insight into both the scale and nature of legacy activities. The process for collecting this data was primarily facilitated through the Evaluation Steering Group whose members include the different organisations and stakeholders largely responsible for the delivery of the 2012 legacy both in London and across the nations and regions. If an organisation was not a member of the steering group it was followed up bi-laterally. In order to ensure consistency of data returns a template was provided by the meta-evaluation team;
- **Evaluation and Research Evidence:** This can broadly be broken down into two types of evidence:
  - **Evaluation Evidence:** Throughout the lifetime of the meta-evaluation, evaluations of 2012 legacy activities have been tracked which has provided us with an understanding of what is likely to be available and when. As such, where evaluation evidence has become available (either interim or final) this has been collected. This has also been supplemented by a similar process of identification, tracking and collection with regard to wider academic research related to the 2012 Games and its legacy;
  - **Primary Research:** In a further attempt to reduce gaps in the evidence base a range of primary research was undertaken according to priorities agreed with DCMS. This generally took three forms: it was undertaken directly by the meta-evaluation team; DCMS commissioned specific surveys; or DCMS or the meta-evaluation team worked with an organisation willing to either do the work or to adapt their existing work to assist in filling the gap.

Case studies of legacy programmes, regional impacts and sponsor activities are also presented throughout the report to provide further details of the outputs and impacts.

The specific sources of evidence used in the analysis are identified within each chapter.

<sup>3</sup> Report 3 set out in some detail the baseline and counterfactual position for each of the four legacy themes and in doing so provided the overall context against which the impact (to date) of legacy initiatives could be measured and evaluated.

<sup>4</sup> See Report 1: Scope, research questions and data strategy.

### 2.3 Availability of evaluation evidence

At this point in the meta-evaluation, there remain some areas where evaluation evidence is absent or patchy. In order to provide some clarity around this – particularly the extent to which there is potential for gaps to be filled – at the end of each of the theme chapters we have included the following summary table which sets out:

- What additional evidence we expect to become available over the next six months and therefore can be included in Report 5;
- What approaches we propose to take to address outstanding evidence gaps for Report 5.

<b>Evidence expected to emerge for Report 5</b>
<b>Possible/ Proposed approaches to addressing the evidence gap in Report 5</b>



## 3 Harnessing the UK's passion for sport

### 3.1 Legacy strategy

The Government has made a commitment to "*harnessing the United Kingdom's passion for sport to increase school-based and grass roots participation in competitive sport – and to encourage the whole population to be more physically active*".<sup>5</sup> Priorities include:

- Bringing back a culture of competitive sport in schools;
- Boosting participation in grass roots sport;
- Increasing participation in wider physical activity;
- Supporting elite athletes;
- Using the power of the Games to give young people around the world access to sports opportunities.

Based upon the Government's sport legacy plans centring on harnessing the UK's passion for sport and encouraging physical activity, the meta-evaluation for the sport theme is grouped into the following sub-themes:

- Participation: With a focus on sport and physical activity participation;
- Infrastructure: Covering the 2012 Games facilities, access to facilities, club membership, sports volunteering and sports coaching;
- Elite: Covering medals performance, athlete development, elite coaching and hosting major events;
- International: Based on the International Inspiration programme.<sup>6</sup>

In order to answer the headline research question for the sport theme (*What have been the impacts of the Games on sport and physical activity and in particular the development of mass participation, competitive school and elite sport?*) an understanding of the impact of the various legacy programmes, initiatives and other activities is required.

For each of the sub-themes we have set out below the key legacy programmes and initiatives<sup>7</sup> including an analysis of available evidence (outputs & expenditure and project-level evaluations) with resultant outcomes and additionality (as available).

<sup>5</sup> Hansard, Written Ministerial Statement by The Secretary of State for Culture, Olympics, Media and Sport on Olympic and Paralympic Games Legacy, 20<sup>th</sup> December 2010.

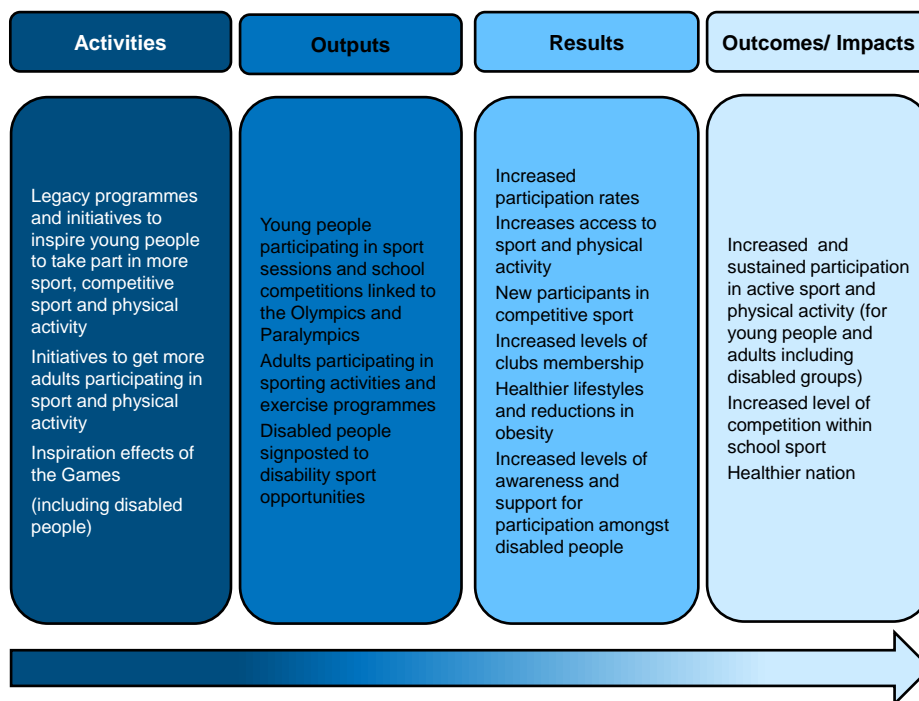
<sup>6</sup> International Inspiration was announced by the then Prime Minister in India on 21 January 2008, bringing into reality the 'Singapore Vision', ie the promise made by the London 2012 bid team to "*reach young people all around the world and connect them to the inspirational power of the Games so they are inspired to choose sport*". The aspiration is to reach 12 million children in 20 countries and the programme aims to use the power of sport to enrich the lives of millions of children and young people of all abilities, in schools and communities across the world, particularly in developing countries, through the power of high quality and inclusive physical education, sport and play.

<sup>7</sup> Details of the various programmes and initiatives are included in Reports 1 to 3.

## 3.2 Participation

The key legacy promises in relation to the participation sub-theme are to increase grassroots participation, particularly amongst young people, and to encourage the whole population to be more physically active.<sup>8</sup> The figure below summarises the logic model for the participation sub-theme.

**Figure 3-1: Participation summary logic model**



Adult participation in sport and physical activity in England has increased from 2005/06 to 2011/12, with the following participation rates recorded (as shown in Figure 3-2):

- Active sport participation in the last four weeks increased from 53.7% in 2005/6 to 55.2% in 2011/12;
- 1x30 minute sessions of moderate intensity sport in the last week increased from 41.2% in 2005/6 to 43.8% in 2011/12;
- 3x30 minute sessions of moderate intensity sport in the last week increased from 23.2% in 2005/6 to 25.9% in 2011/12.

The proportion of people taking part in sport more frequently in England (the 1x30 and 3x30 moderate intensity sport measures) has grown steadily over time, as well as a shift towards personal fitness and less organised sport.

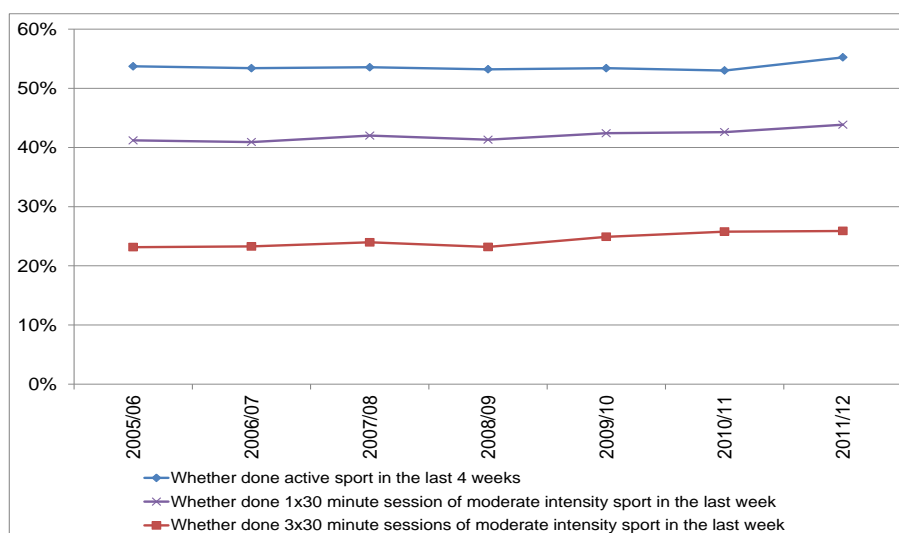
The active sport participation in the last month measure remained static from 2005/06 to 2010/11 but increased in the latest year, from 53.0% in 2010/11 to 55.2% in 2011/12.

Taking Part also indicates that 7.3% of those participating in sport and recreational physical activity indicated that the Games have motivated them to do more.

Similar trends, showing recent growth in sport participation, are shown in the Active People Survey run by Sports England.<sup>9</sup>

<sup>8</sup> Hansard, Written Ministerial Statement by The Secretary of State for Culture, Olympics, Media and Sport on Olympic and Paralympic Games Legacy, 20<sup>th</sup> December 2010.

<sup>9</sup> Active People Survey 6Q2, Once a week participation in sport (1 x 30 minutes moderate intensity), Sports England.

**Figure 3-2: Adult sport and physical activity participation (in England)**

*Note: Active sport excludes recreational walking and cycling, which are included in the 'intensity' measures. There are also minor differences in the sports and recreational activities within the active sport and 'intensity' measures. Moderate intensity sport must be continuous and raise a person's heartbeat and breathing rate.*

*Source: Taking Part survey.*

### (i) Legacy programmes and initiatives

In order to support the participation ambitions, the share of National Lottery funding into community sport was increased, and specific legacy programmes and initiatives were funded. In addition to the specific Games-related programmes aimed at participation, additional funding for sport-related legacy was channelled into existing programmes. Key participation legacy programmes include:

- **Places People Play:** A £150 million National Lottery funded initiative being delivered by Sport England in partnership with the British Olympic Association (BOA) and British Paralympic Association (BPA) with the backing of the London Organising Committee for the Olympic and Paralympic Games (LOCOG). The programme which operates throughout all the regions of England has eight elements with the following two which target participation:
  - **Sportivate:** A nationwide campaign that provides opportunities for teenagers and young adults (age 14-25) to receive six to eight weeks of coaching in the sport of their choice at a local venue, and guides them into regular participation within their community when the six to eight weeks has ended. Sportivate began in April 2011 and will run until March 2015;<sup>10</sup>
  - **Gold Challenge:** An independent initiative supported by Sport England, the BOA and BPA intended to motivate over 100,000 people to get involved in multiple Olympic and Paralympic sports and in doing so raise money for charity. Gold Challenge is a self-funding organisation with a small level of Sport England investment allocated to evaluating its impact. A total of £3 million of National Lottery funding is available for Sport England to invest in the sport delivery system if sports are unable to meet the additional demand created by Gold Challenge participants. Gold Challenge launched in November 2010 and will run until the end of 2012;
- **School Games:** This is a framework of competitions led by Sport England and delivered by the Youth Sport Trust, with additional funding from the Department of Health (DH) and Department for Education (DfE). All schools in England have been given an opportunity to participate, with pupils competing against one another in intra-school (level 1), inter-school (level 2) and county festivals (level 3). A national event (level 4) also includes students from the nations. The first national finals were held at the Olympic Park in May

<sup>10</sup> Sportivate superseded Sport Unlimited programme which ran from 2008 to 2011 building on learning from Sport Unlimited.

2012. It includes competitions for disabled pupils and special educational needs. As part of the School Games, £65 million of DfE funding up to the end of the 2012/13 academic year is to ensure that one PE teacher in every secondary school could be released for one day a week. They will use this time to help encourage greater take-up of competitive sport in primary schools and secure a fixture network for schools to increase the amount of intra- and inter-school competition;

- Free Swimming (discontinued): The Free Swimming Programme was a £140 million programme designed to increase participation in swimming in England, with local authorities providing free swimming for children aged 16 or under and for adults aged 60 or over. It was a cross government initiative with funding from five government departments as well as investment and resource from the Amateur Swimming Association and Sport England. Originally scheduled to run for two years from April 2009 to March 2011, it finished early in July 2010;
- Inspire programme: The 2012 Games Inspire programme enabled non-commercial organisations across the UK to link their events and projects to the 2012 Games in an official scope. Projects and events inspired by the Games applied to be awarded 2012 branding rights in the form of the Inspire mark. Projects covering sport, culture, education, sustainability, volunteering and business have been awarded the Inspire mark. Sportivate is an Inspire project;
- Legacy Trust UK programmes: Legacy Trust UK is an independent charitable trust endowed with £40 million, consisting of Big Lottery Fund (£29 million), DCMS (£6 million) and Arts Council England (£5 million). The charity was set up to use the 2012 Games as a catalyst to fund projects which enable communities from across the UK to take part in cultural and sporting activity during the build up to 2012. It has allocated funding to twelve regional and four national programmes;
- Premier League 4 Sport: A £3.8 million programme with the Premier League working in partnership with the Youth Sport Trust and Sport England in order to get 25,000 young people to join local sports clubs in four Olympic sports (table tennis, judo, badminton and volleyball) by 2011. Although originally planned to run from 2009 to 2011, the programme has been extended to 2013, with an additional £2 million of Premier League funding and extended to four more sports (handball, netball, basketball and hockey);
- Physical Education and Sport Strategy for Young People (PESSYP) (discontinued): PESSYP was jointly led by DCMS and the DfE, and contributed to participation, elite sport and (soft) infrastructure objectives. Although PESSYP begun as a national initiative in 2002, it was subsequently harnessed to help meet 2012 Games objectives and was enhanced with additional funding of £100 million over the 2008/9-2010/11 period, to help create a lasting legacy from the 2012 Games;

The new Government formed in May 2010 decided not to continue with the centrally funded PESSYP programme and instead announced plans for the School Games programme, which was tasked with increasing access and opportunity for more children to do competitive sport. It is, however, up to the schools to decide whether to continue existing activities previously covered under PESSYP, a number of which will be subsumed in aspects of the School Games. Prior to its cancellation, PESSYP consisted of ten strands. The participation strands included:

- Sport Unlimited: Offered young people the chance to attend 'taster' sessions of sport over 8 to 12 weeks. This programme was led by Sport England. It began in 2008 and finished in March 2011 when it was superseded by Sportivate (which used learning from Sport Unlimited). In July 2007, an additional investment of £100 million for 2008 to 2011 into PESSYP was announced, with total funding of £36 million allocated to Sport Unlimited. The additional funding was directed towards the programme to harness and improve its effectiveness as a result of the Games (albeit broadly defined as a sports initiative rather than a 2012 Games programme);
- Competition: Led by Youth Sport Trust, this strand aimed to create a single framework for each sport to provide better competitive sporting opportunities within and between

- schools and give these more profile. Aspects of this strand have been subsumed within the School Games;
- School Club Links: Identified to develop links between schools and community sport clubs. Sport England is working with 34 of the National Governing Bodies (NGBs) of sport to increase the number of 5-19 year olds taking part in accredited community clubs or taking on leadership and volunteering roles within sport. This work will continue to 2013 as part of Sport England's overall investment in NGB Whole Sport Plans;
  - Disability - Playground to Podium: This strand focused on increasing participation amongst young disabled people and ensuring that those with a higher level of ability in PE and sport were identified and progressed along a talent pathway. This continues to be achieved through a series of interventions that form the Playground to Podium framework, in particular Multi-Sport and Multi-Skill clubs. Delivered by the Youth Sport Trust working closely with Sport England, English Federation for Disability Sport and NGBs;
  - School Swimming Improvement: Led by the DfE, this strand aimed to increase the number of children that can meet Key Stage 2 standards;
- Change4Life: This DH supported programme brings together health and education professionals, industry and the third sector, with the shared aim of improving people's diets and levels of activity and in doing so, reducing the threat to their future health and happiness. The goal of Change4Life when launched was "*to help every family in England eat well, move more and live longer*". Change4Life includes a range of programmes and activities, the following three being the key legacy initiatives;
    - Change4Life Sports Clubs: These clubs focus on building a network of new school sport clubs based on seven Olympic and Paralympic sports and are designed to engage the least active children and young people. The clubs aim to use the legacy of the 2012 Games to encourage take up and participation. After an initial £6 million joint funding from the DCMS, DH and the National Lottery, the project is now funded by the DH which has committed £8.4 million until 2015 and delivered by the Youth Sport Trust. By 2015, the DH is aiming to have Change4Life Sports Clubs in 3,000 secondary schools and 10,500 multi-sports clubs in primary schools;
    - Games4Life: Change4Life launched the Games4Life Campaign in summer 2012 to promote physical activity and sport for adults and children in the run up to the London Games. This comprised a nationwide TV campaign to encourage the public to 'join in' with fun and games, direct communication (including an activity questionnaire and personalised physical activity plans to 13 million consumers) and a co-ordinated digital campaign. This will continue after the Games to try to ensure people stay motivated and active. Two hundred thousand Personal Activity Plans have been dispatched so far, in response to just under 100,000 completed questionnaires. A total of 94% of plans have gone to individuals not previously engaged with Change4Life, with 40% of plans provided for adults;
    - Walk4Life: As part of the Change4Life movement, the Walk4Life project aims to encourage people who are inactive, or who do very little physical activity, to walk more to improve their health. The DH gave £1.4 million of funding at the beginning of the project which was registered as an official 'Inspire' project with LOCOG. It officially started in November 2009 and is officially due to run until November 2012;
  - LOCOG sponsor programme of activities and initiatives, including for example:
    - Sainsburys Million Kids Challenge: In April 2011 Sainsbury's launched their 1 Million Kids Challenge, aimed at getting one million children from around the UK involved in the Paralympics by giving them the opportunity to try out a Paralympic sport. Sainsbury's will be supplying free sports equipment to schools and all of the schools participating in the Challenge will be eligible for additional rewards and benefits, such as access to London 2012. Sainsbury's Million Kids Challenge has exceeded its target by

enabling 2.4 million British children to play a Paralympic sport. Online surveys prior to the Games showed that 62% of British children were excited about watching Paralympic events this summer and over three quarters (78%) of children aged 8-15 who have tried Paralympic sports would like to play more.

- Local Heroes: Lloyds TSB Local Heroes programme supports talented emerging athletes in the UK with awards of £1,000 to help with the costs of training and competing at national and international levels. Working in partnership with SportsAid since 2008, the programme has provided funding and recognition to more than 1,000 Olympic and Paralympic hopefuls on their journey to London 2012 and beyond. 22 current Lloyds TSB Local Heroes and 15 ‘alumni’ competed for Great Britain at the London 2012 Olympic and Paralympic Games;
- Deloitte Global Athletes’ Network: aims to assist elite athletes who work at a Deloitte member firm to train and to compete at the highest level whilst pursuing careers with Deloitte.

Many of these programmes would not have gone ahead in the absence of the Games, while others are linked to the Games although not solely Games-related. Whilst many of the initiatives detailed have been focussed in England, the Games have also had effects across the nations, with an example in the following box.

**Box 3-1: Gemau Cymru**

Gemau Cymru is Wales' first multi-sport national event for young people, organised by Urdd Gobaith Cymru and inspired by the 2012 Games. The 3-day event was established in 2011 and showcases the best of school-aged Welsh sporting talent in world-class venues such as the Cardiff International Sport Stadium, Cardiff International Pool and Sports Wales National Centre. The 2011 edition featured over 1,000 competitors across 9 sports. The 2012 edition expanded to over 1,300 competitors across 11 sports. In 2012, 87 volunteers gave their time over the weekend and 320 referees contributed their time.

The project is designed to enhance the performance pathway for Welsh sports and has the potential to discover future elite competitors. Talent scouts attend the event and at least two competitors from the 2011 edition have since represented their country in international competition.

*Source: <http://www.urdd.org/en/gemaucymru/what-gemau-cymru>*

The next two sections explore the outcomes of the programmes listed above, followed by an assessment of project evaluations currently available.

**(ii) Evidence available: Outputs & expenditure**

*Places People Play and School Games*

An estimated £180 million of Government funding has been committed to the sport participation targets of Places People Play and School Games over the 2010/11 to 2014/15 period. While evaluations have been commissioned for Places People Play and School Games, these are not yet available, however preliminary indications are that the programmes are currently delivering against their targets.

- 100,000 people were already registered for Gold Challenge by June 2012 against a target of 100,000 by the end of 2012;
- 98,987 young people had participated in a 6-8 week Sportivate course, with 80,870 people completing the sessions against a target of 60,373 (for year 1; by March 2012) and a final target of 300,000 by March 2015;
- 13,613 schools had registered for School Games (as at 24 May 2012), against a target of 12,000.

The tables below provide an indication of public sector expenditure and outputs from Places People Play and School Games on increasing participation.

**Figure 3-3: Public expenditure on increasing participation**

Legacy programme/ initiative^	Lead Organisation	Indicative Budget*		Actual	
		£	Time period	£	Time period
Places People Play – Gold Challenge	Sport England	£3 m	2013/14	0	-
Places People Play – Sportivate	Sport England	£32 m	2010/11 to 2014/15	£31.7 m	2010/11 to 2014/15
School Games	Sport England (delivered by Youth Sport Trust)	£145 m	2010/11 to 2014/15	£52 m	2010/11 to 2011/12

Note: \* Budgets are yet to be confirmed by Sport England; these figures are indicative only.

Source: Sport England and School Games 2011-12 statistical release.

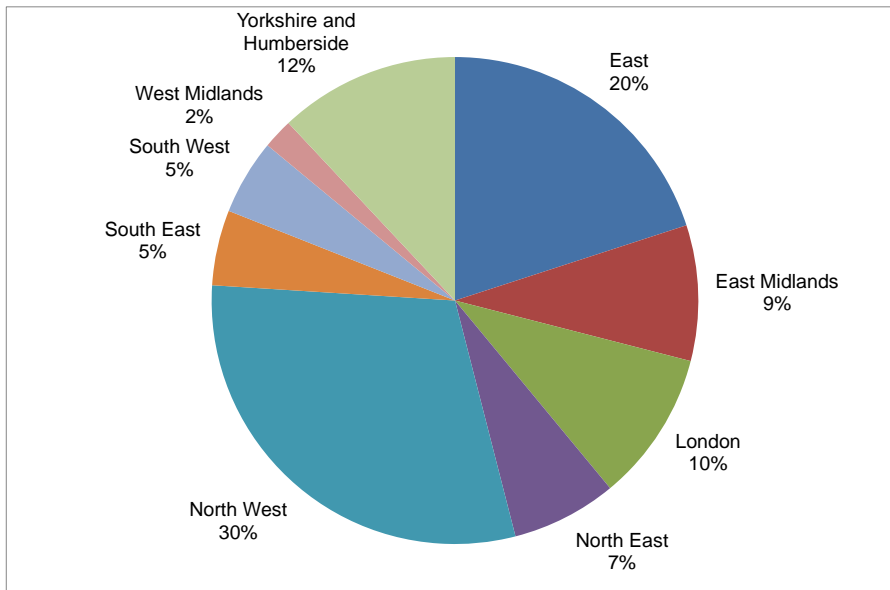
**Figure 3-4: Participation outputs achieved**

Legacy programme/ initiative	Lead Organisation	Total Outputs/ KPI Achieved		Target
		Output	Time Period	
Places People Play – Gold Challenge	Sport England	<ul style="list-style-type: none"> <li>100,000 people registered</li> </ul>	2009/10 to 2011/12 (at June 2012)	<ul style="list-style-type: none"> <li>100,000 people registered by end 2012</li> </ul>
Places People Play – Sportivate	Sport England	<ul style="list-style-type: none"> <li>98,987 young people participating in a 6-8 week course (engaged)</li> <li>80,870 young people completing at least all but one session (retained)</li> <li>579,311 total throughput (attendances)</li> <li>6,428 six-eight week coaching courses delivered (complete)</li> </ul>	2010/11 to 2011/2012 (at March 2012)	<ul style="list-style-type: none"> <li>300,000 young people completing at least all but one session (retained) by March 2015</li> <li>120,000 young people continuing to participate 3 months after the end of their sessions by March 2015</li> </ul>
School Games	Sport England (delivered by Youth Sport Trust)	<ul style="list-style-type: none"> <li>13,613 schools registered</li> <li>9,517 primary schools</li> <li>3,120 secondary schools</li> <li>68 16+ FE colleges</li> <li>564 special schools</li> <li>5 special colleges</li> <li>339 other schools</li> <li>450 School Games Organisers in post</li> <li>46 Local Organising Committees created for Level 3 Festivals</li> <li>31 competition formats at intra-school and inter-school level developed</li> </ul>	2010/11 to 2011/12 (at 24 May 2012)	<ul style="list-style-type: none"> <li>12,000 schools registered by summer 2012</li> </ul>

Source: Sport England

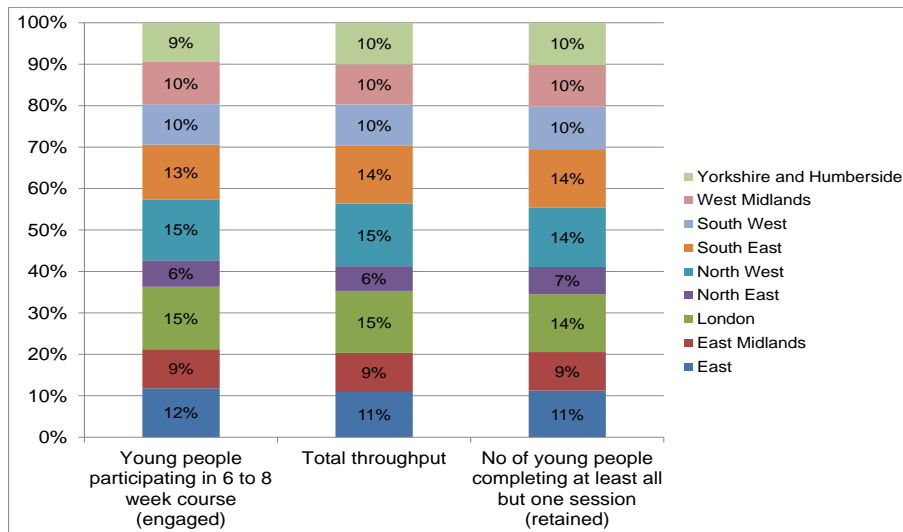
Preliminary indications are that these impacts are being realised regionally with a fairly even split of beneficiaries. This is further supported by regional reports<sup>11</sup>. Detailed regional data is included in Appendix A.

**Figure 3-5: Regional split of Gold Challenge impacts<sup>12</sup>**



Source: Sport England, data to June 2012.

**Figure 3-6: Regional split of Sportivate impacts**



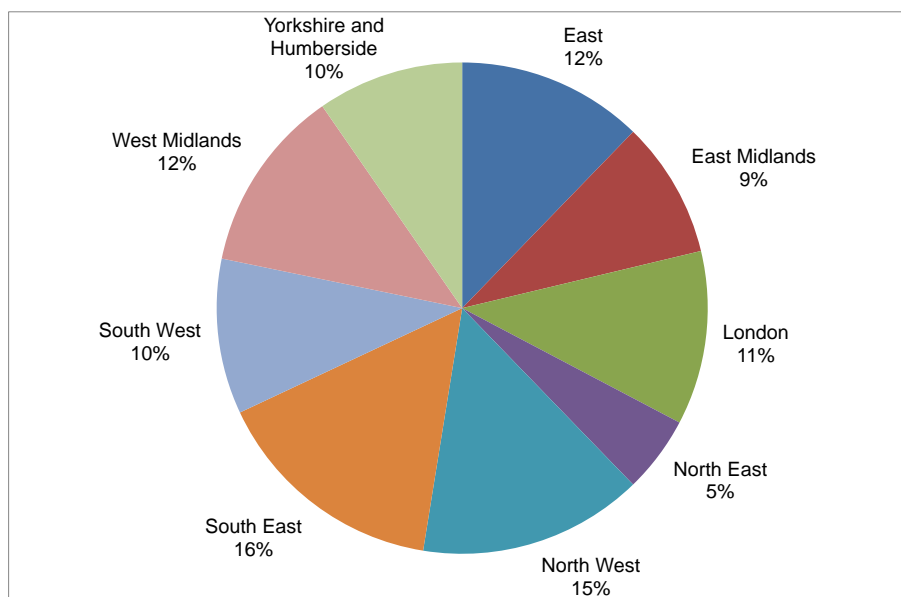
Source: Sport England, data to March 2012.

<sup>11</sup> Source: South East, Six Monthly Report, 01 August 2011 to 29 February 2012 and Lincolnshire Sports Partnership, Sportivate Bulletin, May 2012.

<sup>12</sup> Data for Gold Challenge is provided for England only, although of the 100,000 registrations around 80% are from England with the rest from Scotland, Wales and Northern Ireland.



**Figure 3-7: Regional split of schools registered for School Games**



*Source: Sport England, data to 24 May 2012.*

School Games and the various strands of Places People Play all have specific disability elements. Within Places People Play, £8 million of funding has been dedicated to the Inclusive Sport Fund, which has been designed to support sports participation by disabled people.

Monitoring data and evaluations conducted to date indicate the involvement of disabled people in School Games and Sportivate, namely:

- Sportivate: During the period April 2011 to March 2012, 5.9% of those engaged and 5.9% of those retained identified themselves as disabled;<sup>13</sup>
- School Games: Monitoring data from School Games (Level 4) indicates that 167 disabled athletes took part in Paralympic-type events, equivalent to 11.6% of the total number of 1,439 athletes.<sup>14</sup>

Sportivate sessions targeted at young disabled people are also being run. For example, in Lincolnshire for example, 'Sportivate Yourself Fit and for Pleasure' and Sportivate sessions covering a range of sports for disabled people were held between January and March 2012.<sup>15</sup>

#### Inspire Programme

The Inspire programme has created a significant number of sporting opportunities for youth and adults alike, with many of the participants participating for the first time as well as sustaining people's engagement in sport beyond the life of the Inspire project. In addition, the impact has been experienced across the nations and regions of the UK.

Launched in April 2008, the Inspire programme has resulted in over 2,700 projects inspired by the 2012 Games, creating opportunities for millions of people to get involved in activities spanning sport, education, culture, volunteering and sustainability and in doing so to feel part of the Games. Of the 2,713 Inspire projects, 43% (1,172) have been sport-related with these taking place across the nations and regions of the UK as shown in the figure below.<sup>16</sup>

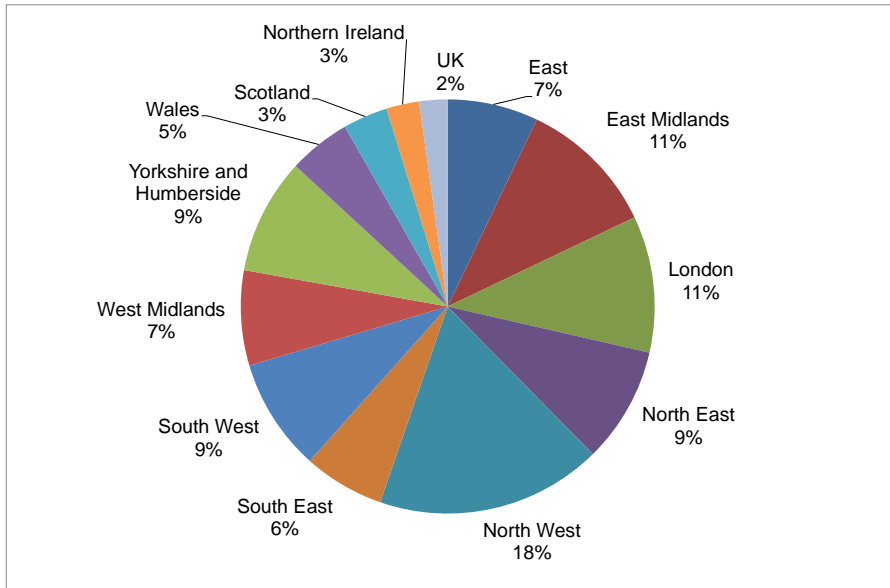
<sup>13</sup> Sportivate Programme Evaluation, Annual report April 2011 – March 2012.

<sup>14</sup> School Games Level 4 Monitoring Data, Sport England.

<sup>15</sup> Lincolnshire Sports Partnership, Sportivate Bulletin, May 2012.

<sup>16</sup> According to the publication, 'Inspire Programme – Key Facts & Figures',

**Figure 3-8: Inspire sport projects location**



Source: Inspire Programme – Key Facts & Figures.

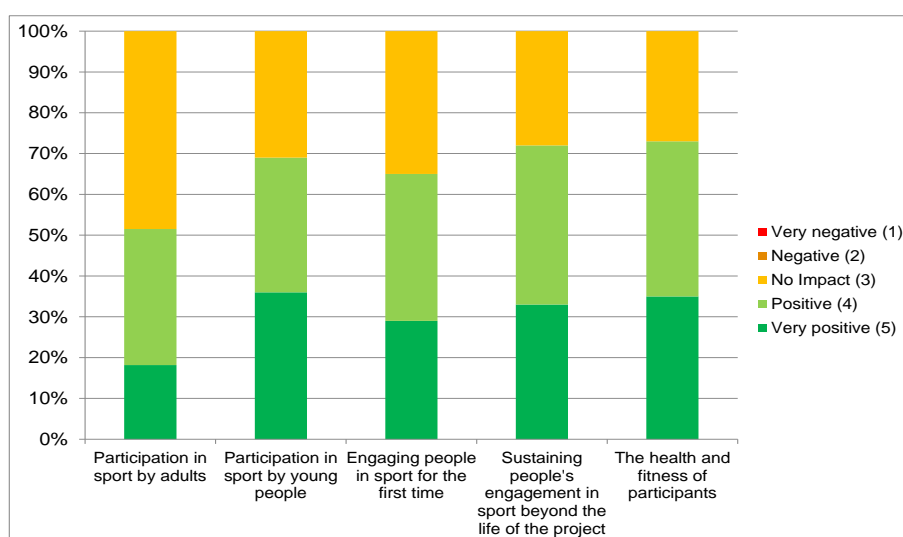
Note: These figures do not always incorporate local versions of UK-wide projects, so in some instances locally reported figures will be higher and are valid and correct.

Most of the data on the Inspire Programme that we have access to is presented at a national or nations/regions level and thus not available for only the sport related projects. However, based on survey results from an Inspire Mark evaluation conducted by Nielsen, the Inspire projects may have encouraged and sustained sport participation as indicated by the following survey results:

- 51% of projects got adults participating in sport;
- 69% of projects got young people participating in sport;
- 65% of projects engaged people in sport for the first time;
- 72% of projects sustained people's engagement in sport beyond the life of the project;
- 73% of projects impacted on the health and fitness of participants.

It should be noted the survey is only based on a sample size of 290 respondents and also reports the perceptions/views of the respondents (ie organisers of the project/event).

**Figure 3-9: Perceived impact of the Inspire projects on sport participation and health and fitness of participants**



Source: Inspire Mark Evaluation, March 2012, Nielsen/LOCOG Survey Results (based on a sample size of 290 respondents).

While not specific to only sporting projects, the Inspire programme has created a potential legacy of projects with 78% of projects set to continue after the Games and 90% of project leads indicating that they have been inspired to run similar projects in the future.<sup>17</sup>

The box below provides an example of the impact of Inspire in the North West.<sup>18</sup>

### Box 3-2: Indicative Inspire programme sport legacy in the North West

In the North West the Inspire programme has the potential to encourage a lasting sporting legacy, encouraging sport participation and sustaining levels of participation:

- 86.9% attended an event involving participation in sport and physical activity;
- 68.5% had taken part in sport at least once a week prior to the Inspire event, rising to 79.2% after the event;
- 60.6%\* indicated that they are likely to participate in sport as a result of Inspire;
- On a scale of 1 to 10, the extent to which participants felt the programme would lead to greater sustained participation was 7.3, with 7.6 for increased participation in sport.

Note: \* Net effect ie 61.3% indicated that they were more likely to participate in sport as a result of Inspire, with 0.7% indicating that they would be less likely – a net effect of 60.6%.

Source: London 2012 Olympic Games and Paralympic Games, Northwest Legacy Survey, May 2012, Knight, Kavanagh and Page.

### Legacy Trust UK: Eastern Rising

Legacy Trust UK, set up in 2007 to support communities and organisations across the UK to create projects that celebrate the 2012 Games, has allocated £40 million of funding through twelve regional and four national programmes.

Eastern Rising, the regional programme for the East of England, is made up of two strands with the bulk of these for sport and cultural programmes or events. Based on an analysis of Legacy Trust UK monitoring data covering the 2009/10 to January 2012 period, Eastern Rising has:

- Benefitted 23,100 participants, 64% of whom have been 25 years old or younger with 2% disabled participants;

<sup>17</sup> 'Inspire Programme – Key Facts & Figures'.

<sup>18</sup> As reported in a Knight, Kavanagh and Page report, dated May 2012 and based on 540 surveys completed by participants (coach, participant, volunteer etc.)

- 91% of the participants have been part of sports/health and wellbeing activities run as part of the project.

#### Premier League 4 Sport

This programme aimed to get 25,000 young people to join local sports clubs in four Olympic sports (table tennis, judo, badminton and volleyball) by 2011. It has been extended to 2013, with additional Premier League funding and extended to four more sports (ie handball, netball, basketball and hockey). Based on data received on the programme, highlights to the end of 2011 include:

- 43,430 young people engaged, against a target of 25,000;
- 24,947 young people engaged in satellite club activity;
- 18,483 young people engaged in taster sessions;
- 63% of young people engaged that were retained (attended at least 5 sessions per term);
- 27% of young people engaged that were sustained (attended at least 10 sessions over two terms).

#### Games4Life

The Games4Life campaign kicked-off on 11<sup>th</sup> June 2012 with the aim of inspiring the nation to get active during 2012's 'summer of sport', which includes the Olympics, Paralympics and Euro 2012. Games4Life intends to build on the excitement associated with these events and encourage millions of people to become active. The campaign runs until the end of September 2012. An evaluation will be conducted, however the timing of this is currently unknown and no interim data is available.

#### Walk4Life

Walk4Life aims to encourage people who are inactive, or who do very little physical activity, to walk more to improve their health. The Walk 4 Life evaluation indicated that physical activity levels increased by 0.73 days a week of moderate physical activity for more than 30 minutes for users registered more than 90 days:<sup>19</sup>

- Walk4Life users are more active than the general population spending an average of 3.42 days of more than 30 minutes moderate physical activity and 2.43 days walking for more than 30 minutes. A third of users meet the recommended weekly 5x30 minutes moderate physical activity threshold;
- 60-70% of users are female and the age spread ranges from teenagers to 75 year olds peaking at 45-54 years old;
- 29% of users stated they have a specific health issue or are disabled so their ability to walk is affected and a sizeable minority (12%) state that they are only comfortable walking for up to 30 minutes;
- 39% of Walk4Life users describe themselves as already 'active' persons but the target market of 'potentially active' makes up 51% of users.

As of July 2012, there were 39,000 walks uploaded on the Walk4Life website and an application where walks are being added at a rate of around 4,000 a month, with almost 50,000 walks having been completed. Within this, the Walk4Life Miles project set a target to have 2,012 mile long walks by the end of the project and 2,213 miles were already identified.<sup>20</sup>

<sup>19</sup> Walk 4 Life Project Evaluation Report, July 2012.

<sup>20</sup> Walk4Life Miles Project, Walk England, July 2012.

### Summary

Output data indicates that the legacy programmes and initiatives aimed at sport participation have provided, and continue to provide, opportunities for adults and young people from across the UK to participate in sport, with an increasing emphasis on participation by disabled people.

#### **(iii) Evidence available: Evaluation and research**

Under the previous Government, key participation programmes included PESSYP and Free Swimming. These were discontinued by the coalition Government formed in May 2011, with funding and efforts focused instead on School Games and Places People Play, with key learning from PESSYP adopted by School Games and certain elements of Places People Play.

An evaluation for Sportivate has recently been produced and evaluation data is available for Free Swimming and PESSYP, which have both had an impact on participation. Given that these two programmes have both been cancelled, the durability of the participation impact will need to be determined over time with input from School Games and Places People Play evaluations when available. An evaluation of the 2010/11 Change4Life Sports Clubs is also available.

Due to the timings of the School Games and Places People Play programmes, evaluations have only recently been commissioned.

### Sportivate

The first year evaluation of the Sportivate programme, through an intention and tracking survey, indicates that Sportivate is helping to keep people involved in sport, is increasing participation levels among a significant proportion of the young people it reaches, is reducing the number of people who do no sport at all and is contributing to increasing club membership. In particular:

- There were over half a million attendances at sessions with 98,869 different teenagers and young adults (aged 14-25 years) who took part in 6,428 completed Sportivate projects. All regions exceeded their performance targets;
- The national average proportion of engaged participants who are retained is 81.7%, up 3.2% on the six month figures;
- Of those who completed the intention survey, 96.4% enjoyed the sessions they attended with 89.2% inspired to take part in more sport. 97.7% indicated they were likely or very likely to continue to take part in sport after the Sportivate sessions ended;
- The tracking survey revealed that to April 2012, the good intentions to participate were in the short term turned into a tangible behaviour change. A total of 88.9% of the retained participants who completed the tracking survey were still taking part in sport 90 days from the end of the Sportivate sessions. 47% of people indicated that they are doing more sport than they did before taking part in Sportivate, with half of indicating that the increase is due to Sportivate. Only 11% are doing less. The percentage of the 967 respondents sample doing no sport at all dropped from 9.9% to 2.1%.

### Free Swimming programme

The Free Swimming programme was based around local authorities providing free swimming for children aged 16 or under and for adults aged 60 or over. Originally scheduled to run for two years from April 2009 to March 2011 (but cancelled in July 2010) the initiative was expected to contribute to the target set out in the London 2012 Olympic Legacy Action Plan. In particular, to get two million more adults more active by the 2012 Games and make a significant contribution to the Government's commitment to provide five hours of PE and sport for 5 to 16 year olds and three hours of sporting opportunities for 16 to 19 year olds.

Over the course of the 16-month programme, 24.44 million free swims were recorded across both target groups, with 14.91 million free swims recorded for the 16 and under age group and 9.53 million for the 60 and over age group.

An impact evaluation conducted for year 1 of the initiative (April 2009 to March 2010) estimated that for those aged 60 and over, additionality was 21.4% whereas for those aged 16 and under additionality was 49.8%, with the main reason for the difference being that free swimmers aged 16 and under were more likely to be accompanied by other (paying) swimmers, although these swimmers are not all in the target age groups. In both age groups, nearly 90% of free swimmers indicated their intention to continue swimming.

**Figure 3-10: Estimated net number of free swims and free swimmers, April 2009 to March 2010**

	16 and under	60 and over
Number of free swims (million)	11.09	6.99
Number of net additional swimmers	49.8%	21.4%
Number of net additional swims (million)	5.52	1.49

*Source: Evaluation of the Impact of Free Swimming, Year 1 report – main report, PricewaterhouseCoopers LLP, June 2010.*

Assessment of the impact on the level of physical activity undertaken by those who had participated in free swimming was positive. Amongst those free swimmers aged 60 and over, the proportion of survey respondents who undertook at least 30 minutes of activity a day increased from 66.2% before the start of the initiative to 78.4% since the initiative was introduced. Amongst those aged 16 and under, the proportion of free swimmers undertaking more than 60 minutes of physical activities increased from 20.7% to 32.9%. The increase in activity levels amongst these respondents could not be entirely attributable to the free swimming programme, but it was concluded that it is likely that some of it is. However a lack of overall additionality contributed to the programme being cancelled.

#### PESSYP

There were five PESSYP strands which targeted increasing participation in sport and physical activity. Of these, evaluations are available for Sport Unlimited and Competitive School Sport. We have been unable to obtain evaluations for Playground to Podium (Disability), School Swimming Improvement or School Club Links.

Sport Unlimited and Competitive School Sport both resulted in increased participation with:

- Sport Unlimited retaining more than 900,000 young people in sporting activity and sustaining at least 300,000 of these;
- Competitive School Sport increasing the number of competitions (intra and inter-school) which in turn increased the number of young people participating in competitive sport.

School Club Links was tasked with developing links between schools and community sport clubs with Sport England working with 34 of the national governing bodies (NGBs) to increase the number of 5-19 year olds taking part in accredited community clubs or taking on leadership and volunteering roles within sport. This will continue to 2013 as part of Sport England's overall investment in NGB Whole Sport Plans.

**Figure 3-11: Key evaluation findings of PESSYP sport participation initiatives**

	<b>Sport Unlimited</b>	<b>Competitive School Sport</b>
Overview	<ul style="list-style-type: none"> <li>Three-year (2008-11) £36 million Sport England funded programme to encourage semi-sporty young people to engage in, be retained in and sustain more sports participation</li> </ul>	<ul style="list-style-type: none"> <li>Aimed to create and develop a world class system for competitive school sport by increasing the quantity and quality of competition to provide opportunities for young people</li> </ul>
Key Findings	<ul style="list-style-type: none"> <li>Target: to retain 900,000 young people in sporting activity by the end of March 2011</li> <li>Achievement: attracted around 1.2 million young people and retained (attended 60% or more of an 8-10 week block of sessions) nearly 82% of these exceeding the retain target by 60,938 young people</li> <li>Overall success was equally apparent for males and females and for different year groups</li> <li>Target: to sustain 300,000 young people in activity (continuing to participate in activity after the Sport Unlimited sessions either by joining a club or participating in informal environments)</li> <li>Achievements: Data from various sources provides evidence that Sport Unlimited did generate sustained participation.</li> </ul>	<ul style="list-style-type: none"> <li>The evaluation revealed that the volume of sport competitions increased resulting in the numbers of young people involved in competitive school sport increasing.</li> <li>Participation was representative by genders, young disabled people, and people from ethnic minorities.</li> <li>Activities to attract young people that did not participate in sport were included.</li> </ul>

*Source: Sport Unlimited, Final Report - Executive Summary, October 2011, Sport Industry Research Centre, Evaluation of Competitive School Sport, Final Report, 30 September 2011.*

The benefits have been felt regionally, with 62,000 young people in the South East who didn't normally play sport outside of school lessons completing a 10-week Sport Unlimited taster session in their own time, around 6% of the total 900,000 participants.<sup>21</sup>

In terms of participation in sport by school children, an initial target was set to increase the percentage of school children who spend at least two hours of each week on high quality PE and school sport to 75% by 2006, extended to 85% by 2008. This target was exceeded in 2008 and thus the target was raised to at least three hours.

It is important to note that as there is a lack of baseline information on how much sport schools were doing pre-PESSYP, it is difficult to accurately determine the extent to which PESSYP contributed to driving the increased target. There was a mandatory curricular requirement for two hours' sport which would have prompted schools into organising themselves to meet this target. In addition, it is possible that many schools were already close to the two hours per week target and PESSYP and the curriculum requirement acted as a driver for the schools to meet this target.

A DfE survey broadly indicates that over the period 2003/04 to 2009/10 participation in PE and out-of-school sport increased and in 2009/10 around 55% of pupils in years 1 to 13 participated in at least three hours of high quality PE and out-of-hours school sport. The characteristics of the DfE survey are as follows:

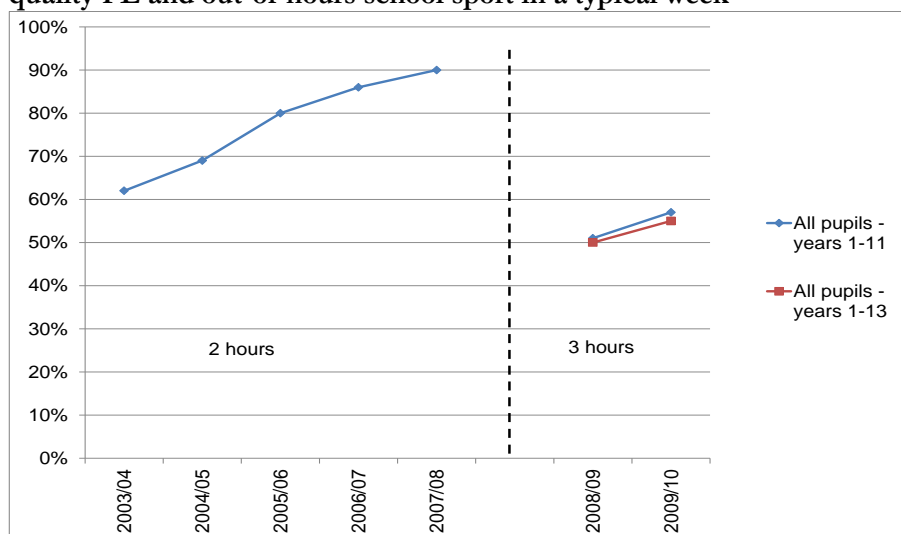
- Conducted annually from 2003/04 to 2009/10;
- Based on a self-completion questionnaire administered by TNS-BMRB to partnership schools involved;

<sup>21</sup> The London 2012 Games in the South East of England, Review of Achievements, 15th March 2011.

- Completed by the schools themselves, although it is unclear who at the school level completed the survey;
- Partnership Development Managers<sup>22</sup> were asked to take responsibility for data collection within their partnership. The self-assessment nature of the questionnaire has resulted in some debate regarding the survey outcomes;
- DfE has cancelled this survey and thus the monitoring data collected to date is unlikely to be collected in this format in the future.

Figure 3-12 indicates how participation increased from 2003/04 to 2007/08, and has continued to increase between 2008/09 and 2009/10.

**Figure 3-12: Percentage of pupils who participated in at least two or three hours of high quality PE and out-of-hours school sport in a typical week**



Source: PE and Sport Survey, DfE.

In addition to increasing the target to three hours in 2008/09, years 1 to 13 as opposed to years 1 to 11 were assessed. This has limited the extent to which detailed trends can be determined since 2003.

### Change4Life Sports Clubs

Since 2010, the Youth Sport Trust has been creating a network of school-based sports clubs using Olympic and Paralympic sports and values to motivate and inspire less active children and young people to participate in physical activity and sport.

The programme is due to run for 5 years from 2010 with the first year funded by DCMS and subsequently being taken on by DH in the second year onwards. The investment from DH is £8.4 million for the 4 years to 2015, when it is hoped that funding from local authorities will become available to continue the scheme. Initially launched into secondary schools in 2010/2011 and rolled out into primary schools in 2011/2012, the idea is to use increased participation as a feeder into levels 1 and 2 of the School Games initiative.

There are 3,000 existing Change4Life Sports Clubs in secondary schools and 4,500 primary clubs started in January 2012. Some of the key highlights from the Change4Life Sports Club evaluation include:<sup>23</sup>

- 61,175 young people participated in Change4Life Sports Clubs in 2010/11, exceeding the KPI of 40,000;

<sup>22</sup> Partnerships are 'families' of schools which typically comprise a Specialist Sports College linked to a set of secondary schools, each of which has a further group of primary and special schools clustered around it. The Partnership Development Manager is at the core of the Strategy and is responsible for managing the partnership.

<sup>23</sup> Sport Industry Research Centre and Evaluation of the Change 4 Life School Sports Clubs Programme, Final Report, August 2011, SPEAR, Canterbury Christ Church University.



- The average age was 13.3 years (targeted age was 13 years);
- At the end of 2010/11, 90% of participants (54,810 young people) chose to play sport every week and were positive about sport (an increase of 40% from around 38,000 upon joining a Change4Life Sports Club);
- Within the target group of those that were not choosing to play every week or that were not positive about sport (over 22,500 young people), those choosing to play sport every week increased by 166% and those positive about sport increased by 89%;
- The average sports club had an investment of £1,842, ran for 2 or 3 terms and took place after school or at lunchtime with 22 members (of whom 6 were previously 'non-sporty'), 1 or 2 new coaches and generating 1.3 new relationships with community clubs;
- The Change4Life Sports Clubs programme delivered over 80,000 sport sessions, trained almost 4,000 coaches, involved almost 8,000 young leaders and led to over 3,5000 new school-club links. It was noted that a small minority of clubs (6%) were simply re-badged as Change4Life Sports Clubs;
- Funding and equipment were rated as vitally important by teachers, with young people also giving the enjoyment of using new equipment their top ranking.

The Change4Life Sports Clubs programme out-performed the counterfactual case (the most likely alternative intervention in a scenario in which the Olympic and Paralympic Games were not being held in London in 2012), generating in excess of that which was modelled for the counterfactual case, namely:

- Over 50,000 more participants;
- Over 13,000 more 'non-sporty' participants;
- Almost 2,000 more school-club links;
- Around 2,900 more trained coaches;
- Around 62,000 more sessions;
- Around 2,100 more clubs.

#### *Summary*

Free Swimming and PESSYP, through Sport Unlimited and Competitive School Sport, did facilitate an increase in sport participation by both adults and young people. However, as Free Swimming was cancelled and PESSYP in its current form was discontinued, with no further evaluations planned, the extent to which they have created a lasting sport participation legacy is challenging to determine. Sport Unlimited has however been superseded by Sportivate, with elements of Competitive School Sport subsumed within School Games, and thus although not directly comparable, evaluations of these two initiatives will hopefully shed some light as to the legacy of PESSYP with respect to sport participation.

#### **(iv) Conclusions: Outcomes and additionality**

Based on the evidence presented above, investment in legacy programmes and initiatives aimed at increasing sport participation, have facilitated participation by adults and young people.

Initial output data indicate that Places People Play and the School Games (the Government's key sport participation programmes) have provided opportunities for adults and young people from across the England to participate in sport, with School Games (level 4) involving the nations as well. In addition these impacts have been experienced across the regions of England with a particular emphasis on disability.

Other legacy programmes including Inspire, the Legacy Trust UK programmes and Premier League 4 Sport also indicate positive impacts. The Change4Life initiatives, Sports Clubs, Games4Life and Walk4Life have also resulted in increased participation. Many beneficiaries have also participated for the first time with participation sustained beyond the programme-

related session or events. Impacts have been recorded regionally throughout England as well as nationally.

Although the Free Swimming Programme did record some increase in swimming participation by adults (over 60 years of age) and children (16 years and younger), there was limited additionality estimated.

The most recent Taking Part survey data indicates increases in participation, with the proportion of people taking part in sport regularly in England (at least one 30 minute session of moderate intensity sport in the last week) increasing from 41.2% in 2005/06 to 43.8% in 2011/12. In addition Sport England's Active People Survey indicates that participation rates for the once per week for 30 minutes at moderate intensity, have increased from 13.9 million adults in 2005/06 to 15.3 million adults in 2011/12.

The latest Taking Part also gives initial evidence of additionality, with 7.3% of those participating in sport and recreational physical activity indicating the Games have motivated them to do more. This is encouraging and could indicate that the various legacy programmes are starting to have a wider impact. Evaluations of these programmes and on-going monitoring of the Taking Part survey data should reveal the extent to which this is additional and will be sustained.

Evaluations of PESSYP (Sport Unlimited and Competitive School Sport) indicate that it facilitated an increase in sport participation amongst young people, including providing additional competitive opportunities. However as Free Swimming was cancelled and PESSYP in its current form was discontinued, with no further evaluations planned, the extent to which they have created a sport participation legacy is difficult to determine. Places People Play and School Games have superseded elements of PESSYP and thus these evaluations, when available, may provide some insight into this with preliminary indications based on monitoring data positive, although an initial evaluation for Sportivate indicates that participation has been increased, and sustained in the short term (3 months after completion).

#### **(v) Progress in answering the research questions**

Based on the evidence presented above, we have answered as far as currently possible, each of the sports theme research questions below.

***To what extent has the goal been met of increasing the involvement of young people in competitive school sport?***

PESSYP appears to have created a system through which additional and better quality opportunities for young people to participate in competitive sport were provided. The evaluation of the Competitive School Sport strand of PESSYP revealed that the volume of sport competitions increased, resulting in more young people taking part in competitive school sport. Opportunities were also provided for young disabled people, people from different ethnic backgrounds and with good representation by gender.

Monitoring data from the School Games initiative indicates that over 13,600 schools have registered, exceeding the target of 12,000, with 31 competition formats at intra-school and inter-school level developed. In addition, these impacts are realised regionally, with schools from throughout England registered. Level 4 of School Games will see the nations involved as well. Given that this programme runs until 2015, it has and will continue to provide competitive opportunities for young people, with the foundation laid by PESSYP and other initiatives facilitating this.

School Games, building on the system created by PESSYP and facilitated by other legacy participation programmes, should continue to increase the involvement of young people in competitive school sport and the extent to which this has been realised will be further assessed once the evaluation of School Games is available.

***To what extent and in what ways have the 2012 Games contributed to increased participation in sport and physical activity amongst young people, including young disabled people in the UK (before and during the Games)?***

PESSYP, Free Swimming, Places People Play, School Games and other legacy initiatives have provided a range of opportunities for young people to participate in sport and physical activity.

DfE surveys of PESSYP indicate that 55% of pupils in years 1 to 13 participated in at least three hours of high quality PE and out-of-hours school sport in 2009/10, with overall participation increasing since 2003/4 although off a different base. Between 2003/4 and 2007/8, participation was measured for two hours (increasing to three hours in 2008/9) with participation rates increasing from 62% to 90% during this period. The Sport Unlimited strand of PESSYP attracted 1.2 million young people, retaining nearly 82% of these young people. Overall, around 300,000 young people's participation was sustained.

Places People Play through Sportivate has provided participation opportunities to almost 100,000 young people and is on target to achieve the milestones set. This coupled with School Games, which has over 13,600 schools registered, provides on-going participation opportunities. These programmes operate throughout England and have specific disability elements. Around £8 million of Places People Play funding has also been allocated to the Inclusive Sport Fund which has been designed to support sports participation by disabled people.

Sportivate and School Games are also providing opportunities to young disabled people. Over the April 2011 to March 2012 period, 5.9% of those engaged and 5.9% of those retained in Sportivate identified themselves as disabled. Monitoring data from School Games (Level 4) indicates that 167 disabled athletes took part in Paralympic-type events – 11.6% of the 1,439 athletes in total.

Other legacy initiatives like Premier League 4 Sport and Inspire have provided participation opportunities to young people, with 43,000 young people engaged by Premier League 4 Sport, almost double its target, with the programme extended in duration and incorporating additional sports. In addition, 63% of young people that were engaged were then retained (at least 5 sessions per term), with 27% of young people sustained (at least 10 sessions per term).

Change4Life Sport Clubs reported 61,000 young people participating, with 90% of these choosing to play sport every week at the end of the first year.

In summary, PESSYP, Places People Play, School Games and other initiatives have contributed to an increase in participation in sport and physical activity leading up to the Games. Evaluations and monitoring data going forward will determine the extent to which this is sustained.

***To what extent and in what ways have the 2012 Games contributed to increased participation in sport and physical activity amongst adults, including disabled adults in the UK (before and during the Games)?***

Free Swimming, Places People Play, Inspire, Change4Life and other legacy initiatives have provided a range of opportunities for adults to participate in sport and physical activity.

Places People Play, through Gold Challenge, has provided participation opportunities to 100,000 people, ahead of the 100,000 people target by the end of 2012. People have been involved from throughout the regions of England, indicating that the benefits are regionally spread.

Based on a survey of the Inspire programme, perceptions are that more than half of the projects resulted in adults participating in sport, with almost two thirds of projects engaging people for the first time and almost three quarters sustaining involvement in sport beyond the life of the project. With organisers indicating that 78% of the projects are set to continue after the Games and 90% of organisers inspired to run similar projects in the future, it seems likely that sport and physical activity participation opportunities will be sustained.

Monitoring data from Legacy Trust UK projects indicates that for Eastern Rising (East of England), over 23,000 people have benefited, with 91% being part of sports/health and well-being activities run.

Walk4Life has also facilitated participation in sport and physical activity, with interim evaluation evidence indicating that this participation is being sustained. Walk4Life has reported that that physical activity levels increased by 0.73 days a week of moderate physical activity for more than 30 minutes for users registered more than 90 days.

According to the latest Taking Part survey data, adult participation levels are the highest since 2005/6, with the following participation rates recorded:

- Active sport participation in the last four weeks increased from 53.7% in 2005/6 to 55.2% in 2011/12;
- 1x30 minute sessions of moderate intensity sport in the last week increased from 41.2% in 2005/6 to 43.8% in 2011/12;
- 3x30 minute sessions of moderate intensity sport in the last week increased from 23.2% in 2005/6 to 25.9% in 2011/12.

Taking Part also gives initial evidence of additionality, with 7.3% of those participating in sport and recreational physical activity indicating the Games have motivated them to do more. The greatest impacts were amongst black and minority ethnic (BME) groups (22.7%), the young (14.7% of 16-24 year olds) and males (9.0%). This suggests that the legacy programmes are contributing positively to a change in participation.

Thus indications are that Places People Play, Inspire and other initiatives have contributed to an increase in participation in sport and physical activity leading up to the Games. Evaluations and monitoring data going forward will determine the extent to which this is additional and will be sustained.

***How far have accessible opportunities for disabled people to participate in sport and physical activity been maximised, through supporting equality of access to Games-related participation programmes?***

Sportivate and School Games are providing opportunities to young disabled people. During the April 2011 to March 2012 period, 5.9% of those engaged and 5.9% of those retained in Sportivate identified themselves as disabled. Monitoring data from School Games (Level 4) indicates that 167 disabled athletes took part in Paralympic-type events, equivalent to 11.6% of the total number of 1,439 athletes.

In addition, the Legacy Trust UK funded project Eastern Rising operating in the East of England reports involvement by disabled participants, with 2% of participants being disabled. The Competitive School Sport (PESSYP strand) evaluation also reported participation by young disabled people.

Participation by disabled people in sport and physical activity is seen as a priority, with both School Games and Places People Play having specific disability elements. In addition, within Places People Play, £8 million of funding has been dedicated to the Inclusive Sport Fund, which has been designed to support sports participation by disabled people.

Evaluations of School Games and Places People Play will provide additional evidence on the extent to which accessible opportunities for disabled people to participate in sport and physical activity has been achieved.

***To what extent has the 2012 Games established the foundations for, and led to sustainable changes in participation in sport and physical activity?***

Preliminary indications are that the 2012 Games has facilitated the establishment of the foundation for changes in participation and physical activity. According to the latest Taking Part survey data, participation levels are the highest since 2005/6, with the following participation rates recorded:

- Active sport participation in the last four weeks increased from 53.7% in 2005/6 to 55.2% in 2011/12;

- 1x30 minute sessions of moderate intensity sport in the last week increased from 41.2% in 2005/6 to 43.8% in 2011/12;
- 3x30 minute sessions of moderate intensity sport in the last week increased from 23.2% in 2005/6 to 25.9% in 2011/12.

Taking Part also gives initial evidence of additionality, with 7.3% of those participating in sport and recreational physical activity indicating the Games have motivated them to do more. This suggests that the legacy programmes are contributing positively to a change in participation although further data will be required to determine the extent to which this increase is sustainable, and the overall impact that the legacy initiatives have had on this.

PESSYP, while discontinued, helped to create a system for sport and physical activity participation as well as creating a system for competitive sport. This will be continued and further developed by the School Games initiative. As part of the School Games, funding of £65 million up to the end of the 2012/13 academic year by the DfE was used to ensure that one PE teacher in every secondary school could be released for one day a week to help encourage greater take-up of competitive sport in primary schools and secure a fixture network for schools to increase the amount of intra- and inter-school competition.

Legacy participation initiatives ultimately aim to create sustainable participation opportunities. For example, the Inspire programme, has resulted in a range of projects providing sport and physical activity participation opportunities for adults and young people. With organisers indicating that 78% of the projects are set to continue after the Games, and 90% of organisers inspired to run similar projects in the future, the foundation has been set for sustainable changes in participation going forward.

In addition, some of the initiatives have shown sustained participation. For example, Premier League 4 Sport has resulted in 63% of young people being retained and 27% being sustained in club sport. The Sport Unlimited strand of PESSYP attracted 1.2 million young people, retaining nearly 82% of these young people. Evidence also indicates that around 300,000 young people's participation was sustained.

Results of the intention survey from the Sportivate evaluation indicate that 96.4% of those who completed the survey enjoyed the sessions they attended, with 89.2% inspired to take part in more sport. 97.7% indicated they were likely or very likely to continue to take part in sport after the Sportivate sessions ended.

A tracking survey revealed that to April 2012, the good intentions of intending to participate were in the short term turned into a tangible behaviour change with 88.9% of the retained participants who completed the survey still taking part in sport 90 days from the end of the Sportivate sessions. A total of 47% of people indicated that they were doing more sport than they did before taking part in Sportivate, with half indicating that the increase was due to Sportivate.

Club membership opportunities created have and will also continue to support sustainable participation (see Section 3.3 for a more detailed discussion). Premier League 4 Sport, School Club Links, Change 4 Life Sport Clubs and others, all contribute to providing participation opportunities by aiming to boost club membership.

In addition to club membership, investment in infrastructure including both facilities and softer infrastructure elements such as coaching and volunteering should facilitate and sustain increased sport and physical activity participation.

Additional evidence is required to fully address this question, with monitoring data and evaluation evidence for School Games, Places People Play and other initiatives expected to contribute to the answer.

***To what extent has participation in sport and physical activity as a result of the 2012 Games resulted in wider social and economic benefits (in particular health and well-being benefits)?***

The Taking Part survey and academic evidence<sup>24</sup> indicates that subjective well-being (or happiness) and perceptions of health are linked to sports participation, with sports participation linked to higher levels of both health and well-being. Over the 2005/6 to 2010/11 period, there is a trend towards people feeling healthier across England, with participation in sport and physical activity likely to be only one of many drivers of health and well-being.

Positive health benefits at the individual level from participation in sport and physical activity are evidenced widely in academic literature, with physical activity (of a certain duration and intensity) delivering health benefits. However it needs to be recognised that while there is a demonstrated causal relationship here, it is also true that improved health enables increased sport participation.

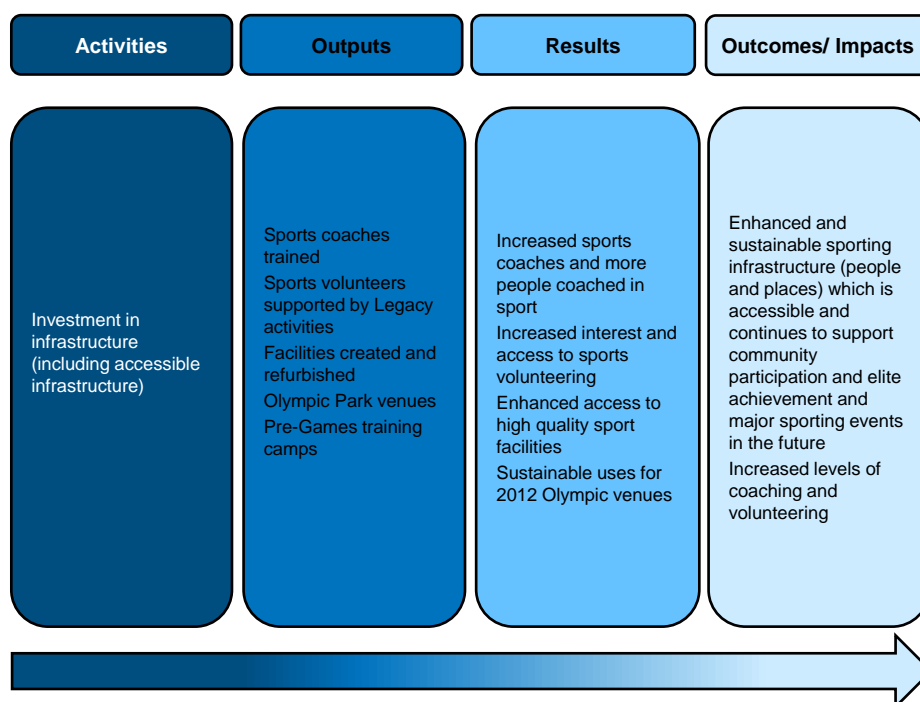
Based on a small survey of the Inspire programme, organiser perceptions are that 73% of the projects impacted on the health and fitness of participants. While further data is required, this is an encouraging view.

<sup>24</sup> See Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 2 – Methods (Grant Thornton et al, 2011).

### 3.3 Infrastructure

In addition to a focus on increasing participation, legacy initiatives to develop sport and health will be supported through investment in infrastructure. The Government aims to transform the places where people play sport and inspire people to enable sport to be undertaken at a local level. However, while significant investment in infrastructure has, and continues to be made in and around the Olympic Park and its venues, there is also investment in other sporting facilities and in 'soft' infrastructure such as sport coaching and sport volunteering. The figure below summarises the logic model for the infrastructure sub-theme.

**Figure 3-13: Infrastructure summary logic model**



Infrastructure essentially covers:

- Physical infrastructure:
  - 2012 facilities
  - Upgrading of, or new build, sporting facilities
  - Facility access and satisfaction
  - Club membership
- Soft infrastructure:
  - Sport volunteering
  - Sport coaching

#### Facility access and satisfaction

As detailed in Report 3, sport participation is influenced by access to facilities and relative satisfaction with these facilities. The Taking Part survey indicates that facility provision is high and growing, with approximately 90% of the population having access to sports facilities within a 20 minute travelling time. These facilities are provided by the public, private, and voluntary sectors.

This does not necessarily mean that suitable provision across a range of sports users is uniform. The Active People Survey indicates that 69.0% of the English population were satisfied with sports provision in 2009/10, down slightly from 69.5% in 2005/6.

However, assessing sport provision satisfaction is challenging as responses to these types of questions can be hard to interpret in isolation and it is not possible to conclude with any accuracy what percentage of very/fairly responses would equate to the provision being satisfactory. Sport provision (which is not explicitly defined in the Active People Survey) is also likely to include a range of factors, with facilities being one of these.

In Northern Ireland, 53% of the population was satisfied with sports provision in 2008/9, as reported in the Continuous Household Survey, Northern Ireland.

#### Club membership<sup>25</sup>

Club membership varies across the UK, although it should be noted that as different surveys have been used, they may not be entirely comparable.

Sports club membership in England is relatively static at around 25% of participants. The Active People Survey also indicates greater levels of male sports club membership. White British and those without long-term illness or disability are more likely to be club members.

Similar patterns for sports-club membership for Wales, Scotland and Northern Ireland by gender and illness/disability are noted. However, whereas the level of engagement in Wales and Northern Ireland is less than in England, at 16.1% and 19% respectively in 2008/9, the level of club membership of 27% in Scotland is similar to England.<sup>26</sup>

#### Sports volunteering

Volunteer levels have remained relatively constant since 2005/6, with 4.5% volunteering in sport in 2009/10. According to the Active People survey, males are approximately twice as likely to volunteer for one hour a week for sport than females. Limiting long-term illness or disability is likely to reduce the probability of volunteering in sport by about 40%.

There are very similar patterns in Wales, with 5% volunteering in sport in 2008/9. In Northern Ireland there is a greater chance of male volunteering in sport, but an even lower proportion of disabled people or people with a long-term illness participating in sport volunteering relative to the total of 5%.<sup>27</sup>

Sport volunteering by children is higher and growing, with the percentage of year 10 to 13 pupils in England actively involved in sports volunteering increasing from 9% in 2003/04 to 25% in 2009/10, according to the DfE Survey of PE and sport.

#### Sports coaching

In 2008, there were approximately 1.1 million people providing coaching in the UK, with 'coach' defined as "*any individual who is involved in providing coaching*" thus incorporating the full range from informally organised volunteers to elite level coaches. There has been a slight decrease in the total number of coaches since 2004.

**Figure 3-14: Total number of coaches in UK (000s) in 2004, 2006 and 2008**

	England	Scotland	Wales	NI	UK
2004	1,020	90	70	40	1,220
2006	984	103	58	32	1,177
2008	927	96	54	31	1,109

Source: *Sports Coaching in the UK, MORI (2004 / 2006 / 2008)*.

Data from Sport Coach UK's 2011 report<sup>28</sup> suggests that there has been little change in the demographic composition of the coaching population since 2004, although the surveys were

<sup>25</sup> Club membership is defined as participants that have been a member of a sports club particularly so that they can participate in the sport in the last four weeks.

<sup>26</sup> Data is sourced from the Active Adults Wales, Continuous Household Survey Northern Ireland and Scottish Household Survey.

<sup>27</sup> Data sourced from Active Adults Wales and Continuous Household Survey Northern Ireland.

<sup>28</sup> Sports Coaching in the UK III: A statistical analysis of coaches and coaching in the UK (drawing in part on BMRB 2008 data).



conducted on a different basis. However, a significant change seems to have taken place in terms of the proportion of coaches with qualifications, with 53% of coaches with a qualification in 2008, up from 30% in 2004.

**(i) Legacy programmes and initiatives**

There has been significant investment in facilities as a result of the Games, most noticeably the 2012 specific facilities, including pre-Games training camps (PGTCs), most of which were unlikely to have gone ahead in the absence of the Games. However in addition to this, the Government also invested in a range of other programmes and initiatives aimed at improving facilities and increasing club membership as well as focusing on 'soft' infrastructure such as coaching and volunteering. Key infrastructure legacy programmes and initiatives include:

- Investment in 2012 facilities: Olympic Park venues, London, out-of-London and non-sporting venues, Games time training camps and PGTCs;
- Places People Play: the infrastructure elements of Places People Play include:
  - Inspired Facilities: Local sports clubs and facilities are being or will be upgraded, with local communities influencing the decision over which are upgraded. Clubs, community and voluntary sector groups and councils are able to apply for grants of between £25,000 and £150,000. The scheme launched in Summer 2011 with the final of five funding rounds taking place in 2014/15. Sport England will invest a total of £80.5 million of National Lottery funding into new facilities over the duration of the scheme;
  - Protecting Playing Fields: Playing fields across the country are being or will be protected and improved, preserving high-quality spaces for local people to play and enjoy sport. £15 million of National Lottery funding is available for this strand. Sport England launched the first of five £2 million funding rounds in May 2011, with the final round being in 2013/14;
  - Iconic Facilities: Sport England investment in a number of iconic multi-sport facilities that are regionally significant for at least two sports. £30 million of National Lottery funding is being invested by Sport England over three years (with the third and final bidding round for funds opening in Autumn 2012);
  - Sports Makers: 40,000 sports leaders have been, are being or will be trained and deployed to organise and lead local level sporting activities. As part of this programme, every leader commits to at least 10 hours of volunteering with the aim that at least half of the leaders will remain active as sports volunteers. Delivered by Sport England in partnership with the BOA and the BPA. The initiative began in April 2011 and will run until September 2013;
  - Club Leaders: Under the strapline 'Better business skills for sport' this initiative provides training and support to those running community sport clubs, thereby helping to create a robust, economically sustainable and enterprising club network. The aim is to help people develop their business skills so that they are better able to meet the challenges faced within their club and assist their clubs in realising their full potential. E-learning, seminars and mentoring is available and initially support is being provided in business and financial planning, marketing, governance, facilitates management and budgeting;
  - Disability: Sport England is determined to create a meaningful and lasting community sport legacy not only from the 2012 Games but also from the Paralympic Games, by growing sports participation by disabled people at the grassroots level. At present, approximately one in six disabled adults plays sport regularly. The Inclusive Sport Fund was launched in May 2012 by Sport England with £8 million of National Lottery Funding. Inclusive Sport closed for applications in August 2012 and Sport England will invest in programmes of up to 3 years that will grow the number of young disabled people (age 14+) and adults regularly playing sport.

- Premier League 4 Sport: This programme, a £3.8 million partnership with Premier League working with the Youth Sport Trust and Sport England, aimed to get 25,000 young people to join local sports clubs in four Olympic sports (Table Tennis, Judo, Badminton and Volleyball) by 2011. Although originally planned to run from 2009 to 2011, the programme has been extended to 2013, with an additional £2 million of Premier League funding and extended to four more sports (handball, netball, basketball and hockey);
- PESSYP (discontinued): PESSYP was jointly led by DCMS and the DfE, and contributed to participation, elite sport and (soft) infrastructure objectives. Although PESSYP begun as a national initiative in 2002, it was subsequently harnessed to help meet 2012 Games objectives and was enhanced with additional funding of £100 million over the 2008/9-2010/11 period, to help create a lasting legacy from the 2012 Games.

The new Government formed in May 2010 decided not to continue with the centrally funded PESSYP programme and instead announced plans for the School Games programme, to increase access and opportunity for more children to do competitive sport. It is, however, up to the schools to decide whether to continue existing activities previously covered under PESSYP, a number of which have been subsumed in aspects of the School Games. Prior to its cancellation, PESSYP consisted of ten strands. The infrastructure strands included:

- Infrastructure: This strand led by the DfE provided funding for 450 School Sport Partnerships, 225 Competition Managers and further education (FE) coordinators, 3,200 School Sports Coordinators and 18,000 Primary Link Teachers. Limited funding for School Sport Partnerships was provided until Summer 2011 (although only for schools that choose to continue them), alongside new funding;
  - Leadership & Volunteering: This programme aimed to develop young people as leaders and mentors to inspire other young people to get involved in sports. Step into Sport (including links to the governing bodies for nine Olympic sports) and the Young Ambassadors initiative were two examples of activity. The latter was recently expanded with financial support from Adidas, as the adiStars initiative. Youth Sport Trust led these initiatives;
  - Recruit into Coaching: This strand was aimed at increasing the quality of coaching offered to young people and the number of volunteer coaches. The programme aimed to get 10,000 volunteer coaches working in 70 deprived areas of England, totalling 675,000 hours of coaching. This also included School Sport Coaching, aimed at developing sports coaches with higher-skill levels. The community component of this programme (as opposed to the schools component) was cancelled in May 2010;
  - Continuing Professional Development (CPD): This strand led by the DfE focused on providing and encouraging continual development for PE teachers through a coordinated national programme;
- Change 4 Life Sports Clubs: These clubs, which form part of the overall Change4Life programme, focus on building a network of new school sport clubs based on seven Olympic and Paralympic sports designed to engage the least active children and young people. The clubs aim to use the legacy of the 2012 Games to encourage take up and participation. After an initial £6 million joint funding from the DCMS, DH and the National Lottery, the project is now funded by the DH which has committed £8.4 million until 2015 and delivered by the Youth Sport Trust. By 2015, the DH is aiming to have Change4Life Sports Clubs in 3,000 secondary schools and 10,500 multi-sports clubs in primary schools.
  - LOCOG sponsor programme of activities and initiatives, including for example:
    - Adi-Zones –large outdoor multi-sports facilities in the shape of the London 2012 logo, designed to encourage young people across the UK to dance, play and work out.

Many of these investments and programmes would not have gone ahead in the absence of the Games, while others are linked to the Games but are not solely Games-related.

The next two sections explore the outcomes of the programmes listed above, followed by an assessment of project evaluations currently available.

**(ii) Evidence available: Outputs & expenditure**Places People Play

To date, an estimated £142 million of National Lottery funding has been allocated to the infrastructure targets of Places People Play over the 2009/10 to 2014/15 period, alongside the significant investment in the Olympic-related facilities and venues. Evaluations have been commissioned for Places People Play but are not yet available. However, preliminary monitoring data indicates that the programmes are currently delivering against their targets:

- As at June 2012, 732 Inspired Facilities awards given in round 1 and round 2 against a target of 1,000 by 2013/2014;
- As at June 2012, 12 Iconic Facilities projects supported (to develop them to the point where they are ready to receive their award) and 4 have received awards;
- As at June 2012, 105 Protecting Playing Fields awards in rounds 1 and 2 against a target of 300 to 450 by 2013/2014;
- As at June 2012, 32,917 people registered for Sports Makers with 18,198 attending an event.

The tables below provide an indication of public sector expenditure and outputs from Places People Play on increasing infrastructure.

**Figure 3-15: Places People Play programme expenditure on infrastructure**

Legacy programme/ initiative	Lead Organisation	Indicative Budget*		Actual	
		£	Time period	£	Time period
Places People Play – Inspired Facilities	Sport England	80.5	2010/11 to 2014/15	15.4	2010/11 to 2011/12
Places People Play – Protecting Playing Fields	Sport England	15	2010/11 to 2013/14	4.5	2010/11 to 2011/12
Places People Play – Iconic Facilities	Sport England	30	2010/11 to 2012/13	6.8	2010/11 to 2011/12
Places People Play – Sport Makers	Sport England	6	2010/11 to 2013/14	4.5	2010/11 to 2011/12
Places People Play – Club Leaders	Sport England	2	2011/12 to 2013/14	0.3	2010/11 to 2011/12
Places People Play – Disability	Sport England	8.6	2012/13 to 2015/16	-	-

Note: \* Budgets are yet to be confirmed by Sport England; figures are indicative only.

Source: Sport England.

**Figure 3-16: Infrastructure outputs achieved**

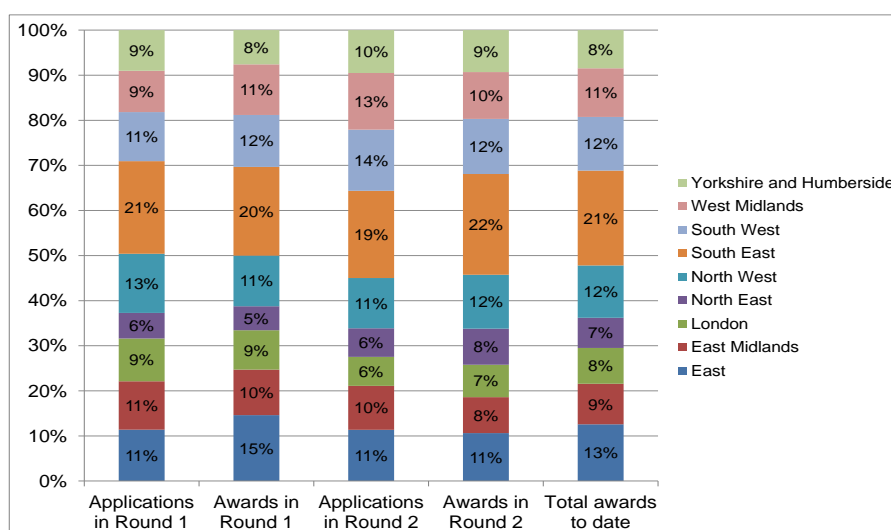
Legacy programme/ initiative <sup>29</sup>	Lead Organisation	Total Outputs/ KPI Achieved		Target
		Output	Time Period	
Places People Play – Inspired Facilities	Sport England	<ul style="list-style-type: none"> <li>1,548 applications (633 in round 1 and 915 in round 2)</li> <li>732 awards (356 in round 1 and 376 in round 2)</li> </ul>	2010/11 to 2011/12 (at June 2012)	<ul style="list-style-type: none"> <li>1,000 awards by 2013/14 (round 5)</li> </ul>
Places People Play – Iconic Facilities	Sport England	<ul style="list-style-type: none"> <li>140 applications (112 in round 1 and 28 in round 2)</li> <li>12 projects supported* (6 in round 1 and 6 in round 2)</li> <li>4 awards (in round 1)</li> </ul>	2009/10 to 2011/12 (at June 2012)	<ul style="list-style-type: none"> <li>No target number of projects</li> </ul>
Places People Play – Protecting Playing Fields	Sport England	<ul style="list-style-type: none"> <li>160 applications (58 in round 1 and 102 in round 2)</li> <li>105 awards (47 in round 1 and 58 in round 2)</li> </ul>	2009/10 to 2011/12 (at June 2012)	<ul style="list-style-type: none"> <li>350 to 450 awards by 2013/14 (round 5)</li> </ul>
Places People Play – Sport Makers	Sport England	<ul style="list-style-type: none"> <li>32,917 people registered</li> <li>23,885 people have booked an event</li> <li>18,198 people have attended an event</li> </ul>	2010/11 to 2011/2012 (at June 2012)	<ul style="list-style-type: none"> <li>40,000 Sports makers completed and logged 10 hours of activity by March 2013</li> <li>20,000 Sports makers continuing to volunteer beyond 10 hours of activity by March 2013</li> </ul>

Note: \* Projects supported are being developed to the point where they are ready to receive their award.

Source: Sport England.

These outputs are occurring across the regions as shown below, with detailed regional data included in Appendix A, with Figures 3-17 to 3-20 summarising these.

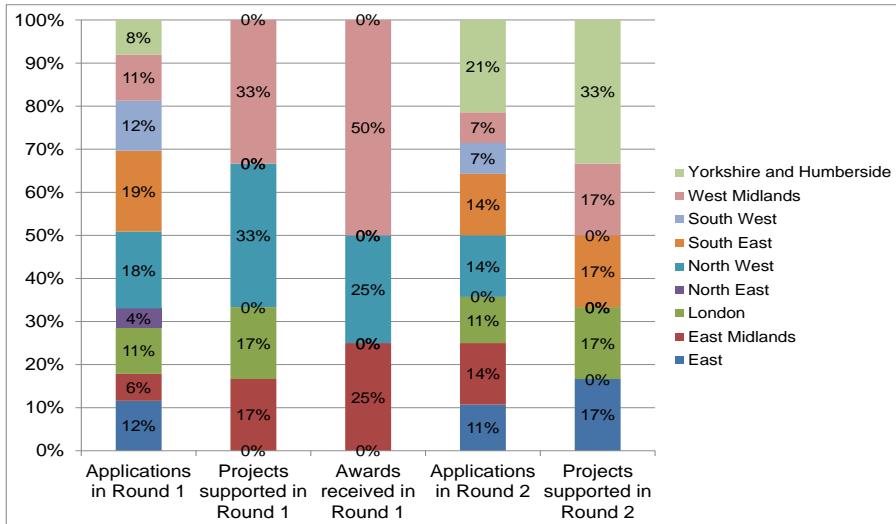
**Figure 3-17: Regional split of Inspired Facilities impacts**



Source: Sport England, data to June 2012.

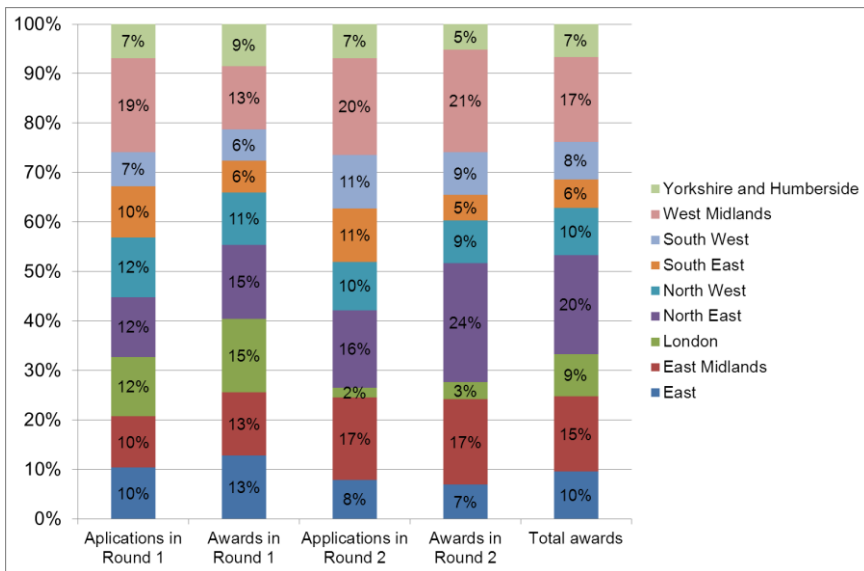
<sup>29</sup> Data is not yet available for Club Leaders or Disability.

**Figure 3-18: Regional split of Iconic Facilities impacts**



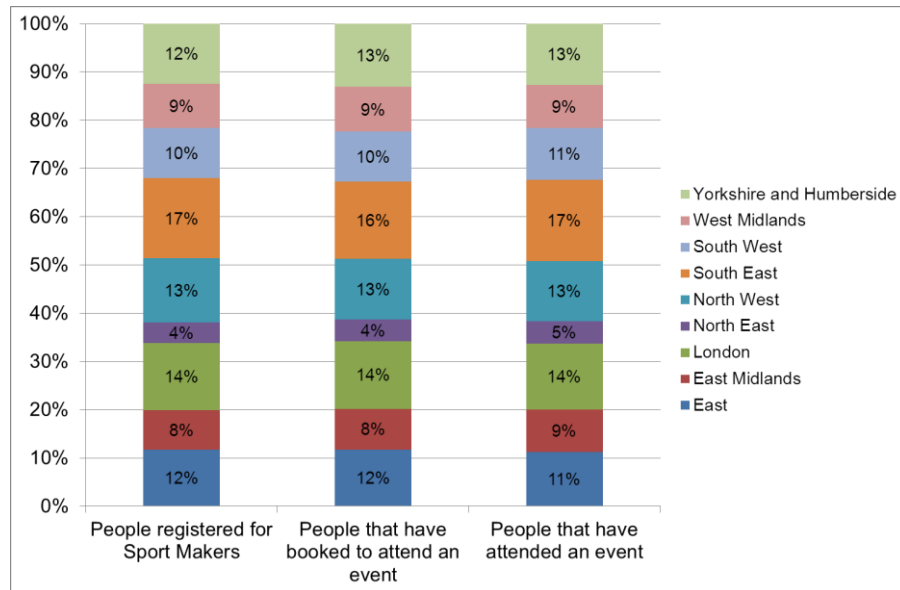
Source: Sport England, data to June 2012.

**Figure 3-19: Regional split of Protecting Playing Field impacts**



Source: Sport England, data to June 2012.

**Figure 3-20: Regional split of Sports Makers impacts**



Source: Sport England, data to June 2012.

Investment in 2012 Games Venues

Of the 34 Games venues, half are new venues and half are existing venues. All of the existing venues are permanent, although some have or will undergo enhancement. Nine of the new venues are permanent and eight are temporary:

- 15 venues are existing and permanent;
- 9 venues are new and permanent;
- 8 venues are new and temporary;
- 2 venues are enhanced and permanent.

**Figure 3-21: 2012 Games Venues**

Venue area	Venue	New/Existing/ Enhanced	Temporary/Permanent
Olympic Park	Aquatics Centre	New	Permanent
	Basketball Arena	New	Temporary
	BMX Track	New	Permanent
	Eton Manor	New	Permanent
	Handball Arena	New	Permanent
	Hockey Centre	New	Temporary*
	Olympic Stadium	New	Permanent
	Velodrome	New	Permanent
	Water Polo Arena	New	Temporary
London	Earls Court	Existing	Permanent
	ExCeL	Existing	Permanent
	Greenwich Park	New	Temporary
	Hampton Court Palace	Existing	Permanent
	Horse Guards Parade	New	Temporary
	Hyde Park	New	Temporary
	Lord's Cricket Ground	Existing	Permanent
	North Greenwich Arena	Existing	Permanent
	The Mall	Existing	Permanent
	The Royal Artillery Barracks	New	Temporary
	Wembley Arena	Existing	Permanent
	Wembley Stadium	Existing	Permanent
	Wimbledon	Existing	Permanent
	Out-of-London	Brands Hatch	Existing
City of Coventry Stadium		Existing	Permanent
Eton Dorney		Enhanced	Permanent
Hadleigh Farm		New	Permanent
Hampden Park		Existing	Permanent
Lea Valley White Water Centre		New	Permanent
Millennium Stadium		Existing	Permanent
Old Trafford		Existing	Permanent
St James' Park		Existing	Permanent
Weymouth and Portland		Enhanced	Permanent
Non-sporting	Athletes' Village	New	Permanent
	IBC/ MPC	New	Permanent

Note: \* New legacy facility to be developed in Eton Manor

Source: London 2012 Website (<http://www.london2012.com/games/venues/index.php>).

Of the nine new permanent venues, six are sports venues and two are non-sporting venues located within the Olympic Park, with one sporting venue located outside of London.

#### *Olympic Park venues*

The London Legacy Development Corporation's (LLDC) sport and healthy living legacy objectives for the Olympic Park are to:

- Promote and deliver community sport in the parklands and sporting venues;
- Promote high performance sport athlete training in the sports venues;
- Host a range of events from international to community sporting events;
- Facilitate the development of sports leaders, coaches, officials and volunteers;
- Design and operate the Park as a catalyst for healthy living.

While these objectives will be fulfilled by all the facilities within the Olympic Park, the sporting venues have a key role to play. Estimates of legacy use are given in the box below.

**Box 3-3: Indicative legacy usage of the Olympic Park sporting venues**

- Around 3 to 4 million visits to the Park's sporting venues in 2016 (subject to attendance at the Stadium);
- Community use (ie not elite) is estimated to be 94% of the overall visits in the sporting venues (excluding the Stadium) with the combined projected visit number from the local/regional area anticipated to be 1.8 million visits;
- Community sports participation is expected to represent at least 96% of the 1.45 million participation visits to the venues each year (excluding the Stadium);
- High Performance Sport training or competition accounts for at least 58,600 visits per annum (a minimum of 3%);
- Participation will vary by facility eg 93% of visits to the Aquatics Centre are likely to be for participation purposes, with 28% in the Multi-Use Arena. Time allocated to community sport participation in the Multi-Use Arena is expected to be a minimum of 72% of the available time, whilst in the Aquatics Centre it is expected to be 95% of the available time.

*Source: Sport and Healthy Living Policy, February 2012, Draft v5*

The table below provides an indication of the legacy usage of the Olympic Park venues.



**Figure 3-22: Legacy usage of the 2012 Games facilities**

Venue	Legacy Usage
Stadium	<ul style="list-style-type: none"> <li>• A multi-use venue with athletics at its heart. It can host athletics, football and other major sporting- and nonsporting events. It has a flexible design that enables it to be re-configured to have a capacity of around 60,000. The warm up track adjacent to the stadium will primarily serve as the centre for community athletics at all levels.</li> <li>• Will host the 2017 World Athletics Championships.</li> <li>• LLDC currently seeking tenants for the venue.</li> <li>• To be re-opened in 2014.</li> </ul>
Multi-use arena	<ul style="list-style-type: none"> <li>• To be operated by Greenwich Leisure Limited in legacy.</li> <li>• A flexible indoor sporting and events venue which can accommodate a range of spectator events, community sport and high performance sport activities, with capacity between 3,500 to 7,500 spectators subject to event format.</li> <li>• Will be the third largest arena in London.</li> <li>• It is expected to attract up to 600,000 visits a year.</li> </ul>
Aquatics Centre	<ul style="list-style-type: none"> <li>• To be operated by Greenwich Leisure Limited in legacy.</li> <li>• Is designed to be used for all aquatics disciplines and to host major events as well as community swimming.</li> <li>• Will accommodate two 50m swimming pools, an international diving pool (including dry diving), all with movable floors and booms, and spectator capacity of between 2,500 to 3,500 people.</li> <li>• It is expected to attract up to 800,000 visits a year.</li> </ul>
Velopark	<ul style="list-style-type: none"> <li>• To be operated by Lee Valley Regional Park Authority (LVRPA) in legacy.</li> <li>• Consisting of: <ul style="list-style-type: none"> <li>– 250m indoor Velodrome with a seating capacity of 6,000.</li> <li>– BMX track designed to provide potential seating areas with the ability to host major BMX events.</li> <li>– A 1.6km floodlit road circuit and 0.9km of extensive Mountain Bike trails.</li> </ul> </li> </ul>
Eton Manor	<p><b>Tennis Centre:</b></p> <ul style="list-style-type: none"> <li>• To be operated by Lee Valley Regional Park Authority (LVRPA) in legacy.</li> <li>• Consisting of 10 tennis courts (four indoor and six outdoor) with complementary support facilities including reception, changing areas, café/bar, storage and office facilities.</li> </ul> <p><b>Hockey Centre:</b></p> <ul style="list-style-type: none"> <li>• To be operated by Lee Valley Regional Park Authority (LVRPA) in legacy.</li> <li>• Consisting of two water-based hockey pitches comprising of one main pitch with 3,000 permanent seats (with the ability to add a further 12,000 temporary seats) and one second pitch. Shared multi use support facilities.</li> </ul> <p><b>Eton Manor:</b></p> <ul style="list-style-type: none"> <li>• Will also include 10 commercial operated 5-a-side football pitches and changing facilities.</li> </ul>

*Source: House of Commons Committee of Public Accounts Preparations for the London 2012 Olympic and Paralympic Games, Seventy-fourth Report of Session 2010–12, 9 March 2012 and Sport and Healthy Living Policy, February 2012, Draft v5*

The Olympic Park sporting venues will cater to an estimated 3 to 4 million people per annum, with a high-level of community usage. The venues will however also cater to elite sport training and competition, as well as a range of other sporting and non-sporting events.

*Out-of-London venues*

Fifteen of the Games venues are existing and permanent, with eight being new but temporary venues. There are four venues, located outside of the Olympic Park, which are new or enhanced, and have undergone significant investment.

**Figure 3-23: Permanent Games venues outside of London**

Venue	Development in the absence of the Games
Lea Valley White Water Canoe Centre	<ul style="list-style-type: none"> <li>This is a new venue.</li> <li>It was the first Olympic facility to open ahead of the Games and will be owned and operated in legacy by the LVRPA.</li> </ul>
Hadleigh Farm	<ul style="list-style-type: none"> <li>This is a new venue with the construction of the new mountain bike course at Hadleigh Farm completed in March 2011. While originally planned as a temporary venue<sup>30</sup> there were clear aspirations for the course to remain in place after the Games. Consultation with residents by Essex County Council indicated that they are favour of the mountain bike course being retained and developed after the Games for elite and community usage. Funding and planning permission has been secured for a venue in legacy at Hadleigh Farm.</li> </ul>
Portland and Weymouth	<ul style="list-style-type: none"> <li>This is an existing venue, which was enhanced as a result of the Games. Weymouth Bay and Portland Harbour will be the venue for the Olympic and Paralympic Sailing competitions. It comprises the Weymouth and Portland National Sailing Academy (WPNSA) and the adjoining commercial marina.</li> <li>In addition to the sailing facilities at Portland and Weymouth which have been enhanced, it is acknowledged that the 2012 Games has kick-started additional regeneration (eg of the former Naval Air Station at Portland, now known as Osprey Quay, where new residential, commercial and marina facilities are underway).</li> </ul>
Eton Dorney	<ul style="list-style-type: none"> <li>This is an existing venue, which was enhanced as a result of the Games.</li> <li>Eton Dorney was the venue for Rowing, Paralympic Rowing and Canoe Sprint events during the London 2012 Games in addition to the sailing facilities at Portland and Weymouth which have been enhanced.</li> <li>The venue's existing facilities have been enhanced, a new bridge constructed and the existing gravel/stone access road to the competition venue has been upgraded.</li> <li>Construction of the lake commenced in 1996, well before the Olympics bid, and was completed in 2006. However, while the lake was clearly not Olympics related and would have been developed irrespective of the Olympics.</li> </ul>

*Source: Stakeholder consultation.*

*Investment in Pre-Games Training Camps (PGTC)*

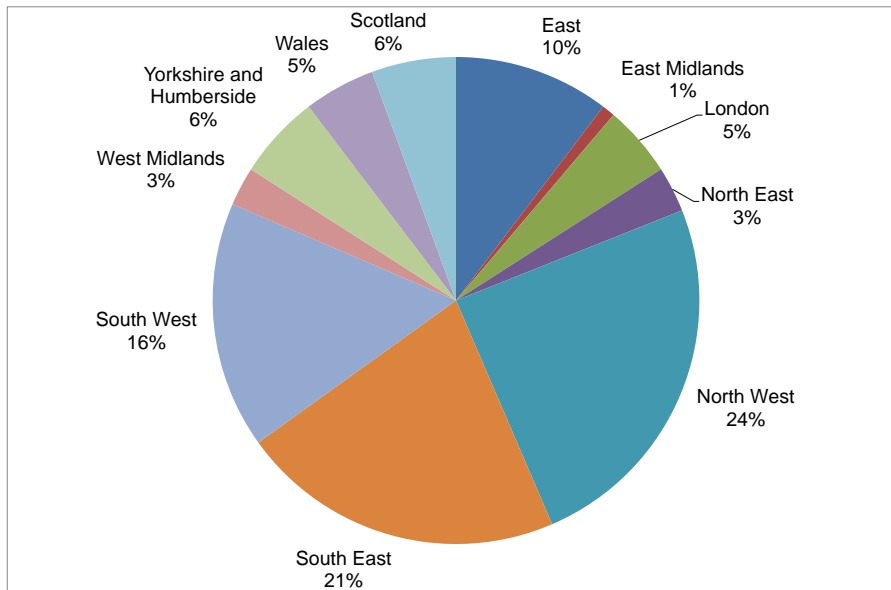
PGTCs provide athletes with a base where they can prepare, train and acclimatise ahead of the Games. These 'camps' are arranged through formal agreements between facilities in the UK and National Olympic Committees (NOCs) and National Paralympic Committees (NPCs) and international teams.

More than 600 high-quality sporting facilities specifically selected as PGTCs were identified in the UK. These venues are situated throughout the UK and provide a range of facilities catering to Olympic sports Paralympic sports and disciplines. As at 16 April 2012 there were 232 PGTC agreements in place across the UK.<sup>31</sup>

<sup>30</sup> <http://www.london2012.com/hadleigh-farm>

<sup>31</sup> <http://www.london2012.com/news/articles/over-200-pre-games-training-camp-agreements-signed-across-the.html>

**Figure 3-24: Number of PGTC agreements per region**



Source: <http://www.london2012.com/news/articles/over-200-pre-games-training-camp-agreements-signed-across-the.html>

DCMS will be conducting a survey with venues hosting PGTCs in mid to late 2012 to determine, amongst other factors, the extent to which the Games impacted on their development. For example, was the investment in facilities planned and then brought forward, or was the investment purely due to the Games. In addition, the potential future legacy of this investment will also be explored. This data will only be available in late 2012 and will be included in Report 5.

There is some evidence that the Games has acted as a catalyst for development, with potential longer lasting impacts. For example, according to University Week 2012 publication<sup>32</sup> "*many of the deals established between the universities and the national Olympic committees go far beyond simple sporting agreements and have produced wide reaching benefits for staff, students and local communities*".

Some initial impacts associated with some of the venues hosting the PGTCs are summarised below. The PGTCs have generated impacts up to 2012 and are expected to generate a legacy beyond 2012, with this likely to be experienced throughout the UK and beyond. In addition to a sporting legacy, there is the potential for a range of other impacts and benefits.

<sup>32</sup> Olympic and Paralympic Games: The Impact of Universities, University Week 2012, 30 April to 7 May 2012.

**Figure 3-25: Initial PGTC impacts - by region**

Region	Impacts
East	<ul style="list-style-type: none"> <li>West Suffolk Athletics Arena: The Rwandan Olympic Team and Paralympic Team opted to train in Bury St Edmunds basing themselves at the West Suffolk Athletics Arena at Bury St Edmunds Leisure Centre. The team received a warm welcome from the local community and plan to return post-Games. School children were invited to meet the team, take part in running sessions and received coaching from Rwanda's Olympic judo player and his coach. The athletes also trained with local sports clubs including the St Edmunds Pacers and West Suffolk Swimming Club. The hosting of the team inspired a wide range of activity including the planting of a celebratory Rwandan garden and mural, a community dance festival in the town centre, the forging of cultural and educational links with a school twinning programme in place and local school children learning more about Rwanda and its history as part of their curriculum. St Edmundsbury Cathedral held a special service for the Olympic Team at which members of the Rwandan High Commission attended and was addressed by Bishop of Kigali.</li> <li>Three years ago, a sporting Rwanda festival was established by King Edward VI School in Bury St Edmunds and this year it was attended by members of the Rwandan Olympic Team. Thousands of pounds have also been raised to buy sporting equipment and training resources for Rwandan schools through community fundraising events and through sponsorship of Cycle 2 Rwanda, a team of three cycled from Bury St Edmunds to Rwanda. The establishment of a strong relationship with the Rwandan High Commission will no doubt deliver a lasting legacy of an international relationship that would not have occurred but for the Games.</li> </ul>
East Midlands	<ul style="list-style-type: none"> <li>Loughborough University: Has been working on a training camp deal with the Japanese Olympic Committee. The university helped to launch the Musubi schools project, which sees students throughout the East Midlands learning about Japanese culture and the Olympic values at interactive workshops hosted on campus.</li> </ul>
London	<ul style="list-style-type: none"> <li>St Mary's University College: In London's new £8.25 million sports centre is a pre-Games training camp venue for athletes from South Africa, Ireland and China. Lord Sebastian Coe commented: "<i>St Mary's is forward thinking and world renowned. It shares the Olympic vision and will have a role to play in sport way beyond 2012.</i>"</li> </ul>
North East	<ul style="list-style-type: none"> <li>University of Teesside: The Sudanese National Olympic Committee chose to extend their stay in Middlesbrough at the University of Teesside. They spent a great deal of time undertaking community activities, including attending a local Park Run, presenting medals at Junior Games, conducting media interviews, attending civic events and encouraging participation of the local Sudanese refugee community in community and sporting activities. The first meeting of the Sudanese refugee community in Middlesbrough was arranged to 'welcome' their national sporting heroes and due to the links made with other community partners at this event, the Sudanese refugees are now talking to the local council and community police about a permanent meeting place for their cultural and social gatherings.</li> <li>Gateshead College Academy for Sport: A team of seven boxers and two trainers from the Colombian Olympic Boxing team travelled to Gateshead in advance of the World Amateur Boxing Championships in Azerbaijan – the World Qualification Tournament for the London 2012 Olympic Games. The team trained alongside young boxers from the newly launched Gateshead College Boxing Academy during their stay.</li> </ul>
North West	<ul style="list-style-type: none"> <li>Manchester Metropolitan University: Manchester Metropolitan Cheshire in partnership with Cheshire East Council consortium held pre-Games training camps for the Vanuatu Women's Beach Volleyball Team and two long-stay developmental camps for two kiribati boxers. It also hosted developmental pre-Games training camps for two track and field athletes from the Solomon Islands and held camps for qualifying Olympians from Kiribati, the Solomon Islands and Vanuatu. The Sugden Centre in Manchester, jointly owned with The University of Manchester, hosted the Brazilian Paralympic team for wheelchair fencing, sitting volleyball and boccia.</li> </ul>
South East	<p>A report<sup>33</sup> of the PGTC project in the South East region, where 150 or one fifth of all UK PGTC facilities are located indicates that in terms of impacts:</p> <ul style="list-style-type: none"> <li>Improved facilities with investment and improvements brought forward as a result of the Games, new improvements and refurbishments and the development of facilities to widen and deepen the training offer. Examples include:</li> </ul>

<sup>33</sup> South East England, Hosting the World, Bringing Pre-Games Training Camps to the South East, Final Report March 2012.

Region	Impacts
	<ul style="list-style-type: none"> <li>– Bletchley Leisure Centre and Surrey Centre for Sport (Surrey University) have both received £1 million of National Lottery investment to develop the sites. Medway Park in Kent (formerly Black Lion leisure Centre) received £1 million of National Lottery funding to provide a multi-sport facility providing local and regional opportunities;</li> <li>– Mountbatten in Portsmouth had their 50m swimming pool refurbished with £5 million of National Lottery investment;</li> <li>– Stoke Mandeville had improvements to the accommodation, resurfacing and access improvements allowing new international competitions to be hosted here. Direct expenditure impact of PGTCs in advance of the camps taking place is estimated at a minimum of £2 million.</li> </ul> <ul style="list-style-type: none"> <li>● A high degree of regional collaboration has been promoted;</li> <li>● International sports competitions have been attracted to the region potentially creating a legacy for further major sports events after the Games.</li> </ul>
South West	<ul style="list-style-type: none"> <li>● University of Bristol: In 2007 the University of Bristol became one of the first institutions to host a PGTC agreeing a deal with the Kenyan Olympic team. This led to the formation of the Bristol-Kenya Partnership which has resulted in a range of benefits for both, including: <ul style="list-style-type: none"> <li>– Coach and athlete exchanges in athletics, rugby, cricket and football;</li> <li>– Twinning primary and secondary schools in Bristol and Kenya;</li> <li>– Promoting tourism and cultural exchange between the Bristol and Kenyan communities. The project also grew to include the University of West England in Bristol, and other partners including Bristol City Council, Filton College and professional sports clubs in the city.</li> </ul> </li> <li>● The University of Gloucestershire: Signed a deal to host Malawi's athletes' training camps. The university has established strong links with Malawi through an international outreach initiative which uses sport as a vehicle for community development, and a memorandum of understanding between the two was signed in 2011.</li> <li>● University of Bath: ParalympicsGB selected the University of Bath as its key training base in the lead-up to the 2012 London Paralympic Games. The university aims to create a legacy beyond 2012 from its strong partnership with the BPA through the establishment of a Centre of Excellence for Disability Sport and Health (DASH).</li> </ul>
Yorkshire & Humberside	<ul style="list-style-type: none"> <li>● University of Bradford and Bradford College: Hosted training camps for athletes from Vietnam and Tanzania in the run-up to 2012 Games. Estimates are that the pre-Games training camp activity will bring an additional £200,000 in international income for Bradford.</li> </ul>
Scotland	<ul style="list-style-type: none"> <li>● The University of Aberdeen and Robert Gordon University: Helped to host the Cameroon Olympic team prior to the 2012 Games. Shona Robison, Scottish Government Minister for Commonwealth Games and Sport, said: "<i>Securing pre Games training camps not only gives Scotland the opportunity to showcase our facilities but also allows us to promote our nation and its people as a place to visit and do business for both 2012 Games, Glasgow 2014 and beyond.</i>"</li> </ul>
Wales	<ul style="list-style-type: none"> <li>● Cardiff University: Welcomed athletes from South Africa on to its campus. Head of Sport and Exercise Stuart Vanstone indicated that he hoped the team's presence can be a huge advantage to staff and students. He said: "<i>We're hoping for some real legacy benefits from the pre-Games training camp.</i>"</li> </ul>
Northern Ireland	<ul style="list-style-type: none"> <li>● Queen's University: Welcomed international Olympic boxing teams from Cuba, Puerto Rico, Canada Argentina, Australia and Colombia. The Sports Minister Caral Ni Chuilin said: "<i>It is a privilege to welcome and host all of these teams as they train in preparation for the 2012 Games. By the end of the Games we will have hosted over 1,000 athletes from over 100 countries.</i>" Overall the PGTC involved 12 different sporting venues, hosted boxing, gymnastics, athletics, wheelchair basketball, wheelchair fencing, hockey, badminton, boccia, cycling, table tennis and two full Paralympics squads.</li> </ul>

*Source: Olympic and Paralympic Games: The Impact of Universities, University Week 2012, 30 April to 7 May 2012, Case Studies provided by London 2012*

### Investment in sport and fitness facilities

Sport and fitness facility openings in London 'gathered pace' before the 2012 Games.<sup>34</sup> More than 350 new sports facilities have been opened in London since it was awarded the Games' in 2005, with 100 of these being new-build facilities, with the remainder consisting of extensions to existing centres. Nearly two-thirds of the projects have been privately-funded.

In addition in five of the past six years, sports and fitness facility openings have been at a faster rate than commercial office schemes in central London.

### Premier League for Sport

In terms of club membership, Premier League for Sport has resulted in:

- 24,947 young people engaged in satellite club activity from 2008/9 to 2011/12;
- 343 satellite clubs established by 2010/11.

### Summary

Output data and other evidence indicates that the legacy programmes and investment in infrastructure have resulted in benefits and impacts being felt across the UK, with the potential for a longer-term legacy.

### **(iii) Evidence available: Evaluation and research**

The only evaluation evidence available for infrastructure relates to the infrastructure strands of PESSYP and an initial evaluation of Change4Life Sports Clubs.

In terms of primary research, DCMS will be conducting a survey with PGTCs in mid to late 2012 which is expected to provide insight and evidence with respect to the impact of 2012 on venues and facilities across the UK. This data will only be available in late 2012 and will be included in Report 5.

### PESSYP

There were five PESSYP strands which looked at improving infrastructure. Of these, evaluations are available for Leadership and Volunteering, and Recruit into Coaching. Evaluations for Infrastructure or Continuing Professional Development (CPD) have not been commissioned.

Leadership and Volunteering consists of four programmes, namely Step into Sport, Young Ambassadors, Young Officials and Young Event Volunteers. These programmes encouraged young people to become the sports volunteer workforce of the future by engaging them in a variety of roles including officiating, volunteering at major events and helping to organise school competitions. An evaluation of the impacts of these programmes indicates that:<sup>35</sup>

- While the programme has engaged young people with a diverse range of attitudes and experiences of sport, school and volunteering, and analysis of the demographic characteristics of young leaders indicates that they are disproportionately female, white and from higher socio-economic backgrounds. They were less diverse than the school population as a whole with respect to ethnicity, eligibility for school meals and special educational needs;
- The programme has facilitated the personal, social and academic development of young people, with young leaders indicating that their involvement in the programme has impacted positively on their future employability. This was especially noticeable in those young leaders who were also Young Ambassadors;<sup>36</sup>
- Young leaders have facilitated participation in sport for other young people.

<sup>34</sup> Drivers Jonas Deloitte (2012). Crane Survey, London Sports Facilities, 2012.

<sup>35</sup> Leadership and Volunteering Impact Evaluation, August 2011.

<sup>36</sup> Leadership and Volunteering Impact Evaluation, Young Ambassadors Programme, Report 2011.

School Sport Coaching aimed to support around 1,500 additional coaching hours per School Sport Partnership per year. Key findings from the evaluation of the School Sport Coaching programme conducted after three years indicate:<sup>37</sup>

- The average number of qualified sport coaches increased. In particular, in the third year there was an average of 5.7 qualified sport coaches (paid and volunteer) working in each primary school in comparison with 3 coaches before the programme started, a 90% increase. In secondary schools, there was an average of 8 qualified sport coaches (paid and volunteer) working in each secondary school compared with 4.8 coaches before the programme started (a 67% increase);
- During the third year of the programme it is estimated that there was an additional 1,857 hours of extra-curriculum coaching per partnership in comparison with before the programme started.

The Recruit into Coaching programme was announced in September 2007 and included an investment of £5 million over three years to recruit, develop and place 10,000 new coaches in 70 of England's most deprived areas. The Recruit into Coaching evaluation<sup>38</sup> conducted after 2 years (pilot and year 1) deemed the programme to be a "*success in the pilot and Year 1 in that it largely achieved its outputs and there were evident examples of impact at the outcome level*". These outcomes at the end of year 1 are as follows:

- 4,029 trainees entering coaching by attending a structured recruitment and induction process, exceeding the target of 3,759 by 450;
- 2,152 trainees in the community setting received funding to take an award of qualification, exceeding the target of 2,050 by 102. Thus, about four out of five recruits were going on to undertake a coaching qualification;
- 1,053 trainees in the community setting achieved their first recognised UKCC qualification, missing the target of 1,142 by 53. Thus just over two in five recruits had completed a coaching qualification at the end of year 1;
- 1,640 trainees in the community setting deployed, exceeding the target of 1,513 by 127. Thus an estimated two thirds of recruits in the community setting had deployed at the end of year 1;
- 418 unemployed recruits in the community setting entered the coaching pathway, missing the target of 421 by 3. Thus just over one on five recruits came from an unemployed background at the end of year 1.

These results are based on an interim evaluation. It is understood that there is a final evaluation, and when available, will need to be assessed to determine the impact.

#### Change4Life Sports Clubs

According to the Change 4 Life Sport Clubs evaluation,<sup>39</sup> the programme trained almost 4,000 coaches, involved almost 8,000 young leaders and led to over 3,500 new school club links. The programme has out-performed the counterfactual case as follows:

- Almost 2,000 more school-club links;
- Around 2,900 more trained coaches;
- Around 62,000 more sessions;
- Around 2,100 more clubs.

<sup>37</sup> Evaluation of the School Sport Coaching Programme, Final Report, Institute of Youth Sport, School of Sport, Exercise and Health Sciences and Loughborough University, September 2011.

<sup>38</sup> Recruit into Coaching, Year One Evaluation Report, sports coach UK, September 2010.

<sup>39</sup> Evaluation of the Change 4 Life School Sports Clubs Programme, Final Report, August 2011, SPEAR, Canterbury Christ Church University.

### Summary

While indications are that PESSYP has resulted in an increase in 'softer' infrastructure, especially amongst young people, the longevity of this impact remains to be seen in the light of PESSYP being discontinued. Evaluations of Places People Play should provide additional insight into the durability of the impacts.

#### **(iv) Conclusions: Outcomes and additionality**

There has, and will continue to be, significant investment in infrastructure as a result of the Games. The new sporting venues in the Olympic Park are expected to cater to an estimated 3 to 4 million visits per annum, with a high-level of community usage projected. The venues will also cater to elite sport training and competition, as well as a range of other sporting and non-sporting events.

There has been significant investment in facilities throughout the UK, in the form of venues for PGTCs as well as the Places People Play infrastructure elements. As a result of the Games, in some cases PGTCs have improved facilities with investment or brought forward already planned improvements, while in others refurbishments and the development of facilities has occurred. Preliminary data from PGTCs indicate that benefits and impacts have been felt across the UK, extending beyond only sport benefits, together with a potential for a longer-term legacy.

In terms of 'soft' infrastructure, specifically coaching and club membership, PESSYP has resulted in an increase in opportunities, especially amongst young people. Sports Makers and Club Leaders focus on volunteering and providing additional support to facilities is also likely to continue.

#### **(v) Progress in answering the research questions**

Based on the evidence presented above, we have answered, as far as currently possible, each of the different research questions below.

***To what extent have the 2012 Games been used as an opportunity to secure the sporting infrastructure (personnel, investment and facilities) required to sustain a world class, high performance system, and support increased participation and elite sport across the UK?***

Monitoring data and evaluation evidence indicates that the Games is starting to facilitate the sporting infrastructure required to sustain a world class, high performance system, to support increased participation and elite sport across the UK.

Significant investment has been made in facilities throughout the UK as a result of London hosting the 2012 Games. The Olympic Park will in legacy include a range of world class sporting facilities, with an anticipated 3 to 4 million visits expected to the Park's sporting venues in 2016 (subject to attendance at the Stadium). Community usage of these facilities remains a core priority for the LLDC, with 94% of visits expected to be community usage. The venues will also cater to national and international elite athletes, with a series of international sporting events planned.

In addition to the Olympic venues, there has been significant investment in PGTCs and Games-time training camps. By April 2012, there were over 230 PGTC agreements in place across the UK, with investment in these facilities likely to generate and sustain sports participation going forward.

Monitoring data on the investment in local facilities, through the Places People Play initiatives Iconic Facilities, Inspired Facilities and Protecting Playing Fields, indicates that almost 850 facilities have received awards, with these programmes on track to meet their targets. Central to these awards is that the facilities concerned must support participation, and evaluations of this programme will reveal the extent to which this has occurred. Investment has been made in facilities throughout England, thus facilitating the creation of sporting infrastructure outside of London.

Securing the softer infrastructure is also vital in creating a sustainable sporting system, and investment into volunteering, coaching and club membership is on-going.



Monitoring data from the Sport Makers component of Places People Play indicates that around 33,000 people have registered as volunteers with around 18,000 attending an event, with the volunteer population spread throughout the regions of England. This initiative aims to create a pool of 20,000 Sport Makers by March 2013, who will continue to volunteer beyond 10 hours of activity, thus assisting in supporting the creation of a sporting infrastructure.

Premier League 4 Sport has created 343 satellite clubs in 2011/12, with Change 4 Life School Sports Clubs indicating that the programme generated almost 2,000 more school-club links and around 2,100 more clubs than the counterfactual scenario. In addition, around 2,900 more coaches than the counterfactual scenario were created. The Leadership and Volunteering and School Sport Coaching strands of PESSYP have supported young people with a range of skills including volunteering and leadership, for example officiating at major events, assisting with organising school competitions and other volunteering activities.

***How far have accessible opportunities for disabled people to participate in sport and physical activity been maximised (and specific barriers to participation been reduced) through Games-related investments in infrastructure?***

There is limited data at this stage on how far accessible opportunities for disabled people to participate in sport and physical activity have been maximised and specific barriers to participation reduced.

Accessibility has however remained a core objective for the ODA, LOCOG and LLDC when designing and constructing the venues to ensure that disabled people are able to use the facilities within the Olympic Park in legacy, to participate in events and to attend as spectators or supporters. The Paralympic Games has also assisted in focusing efforts on this. Further consultation with the LLDC may provide additional evidence on how this investment has been made.

Places People Play has an additional £8 million of funding dedicated to increasing participation in sport by disabled people through the Inclusive Sport Fund. The evaluation of this programme should provide further evidence on the extent to which this has happened.

***To what extent and how have 2012 Games-related venues, facilities and personnel been embedded within local communities across the UK, and contributed to wider social and economic strategies and programmes?***

The East London chapter describes in detail how investment in the development of the Olympic park, of which the sporting venues are a significant part, has the potential to impact on the local community and contribute to social and economic development of this part of London.

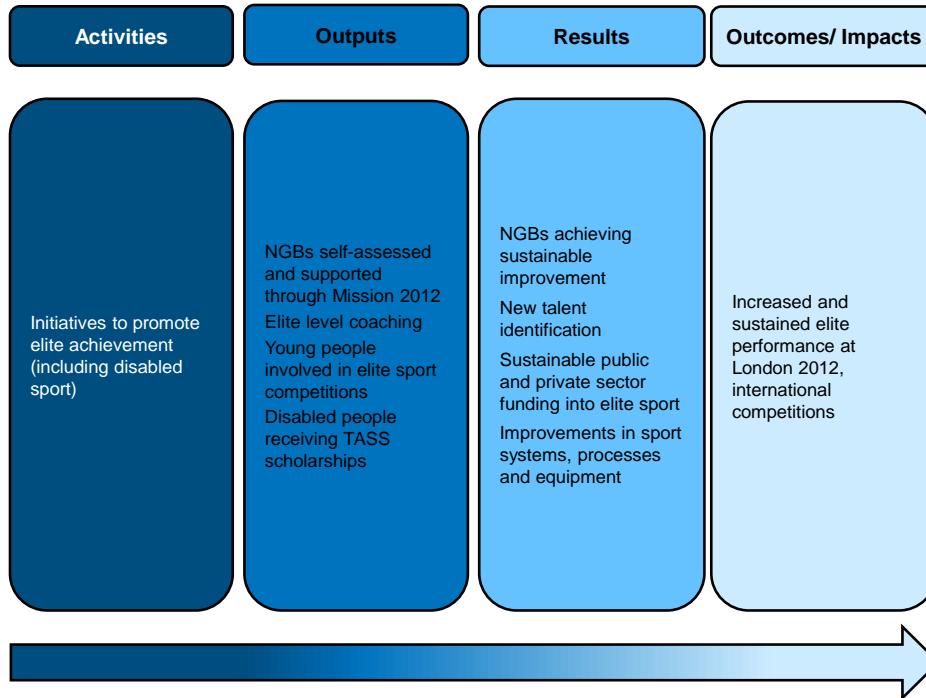
Investment in facilities, sports volunteers, coaching and club membership related activities has been made throughout England, with investment through Inspired Facilities, Iconic Facilities and Protecting Playing Fields taking place in all the regions of England. Initial indications are that the out-of-London venues, including Lea Valley White Water Canoe Centre, Hadleigh Farm, Portland and Weymouth and Eton Dorney, will have a positive impact on the areas and communities they are located in, creating a potential legacy.

In addition, more than 230 PGTC agreements signed throughout the UK suggests that the Games has acted as a catalyst for investment/development with potential longer lasting impacts for the communities within which these facilities are located. Benefits noted to date have included better/improved regional collaboration, as well as economic and wider social benefits associated with international sporting events which have been, and will continue to be, attracted to the improved venues. Discussions with NGBs in late 2012 should provide additional insight into this, as should the PGTC survey currently underway.

### 3.4 Elite sport

The aim of the elite sport legacy is to maintain and further develop a world class high performance system in the UK. The figure below summarises the logic model for the elite sport sub-theme.

Figure 3-26: Elite summary logic model



A selected and adapted set of nine Sports Policy factors Leading to International Sporting Success (SPLISS factors) are employed in determining the impact on elite sport. These factors are the key policy determinants which are important for international elite sporting success. These factors are outlined in the box below, though several are covered elsewhere in this paper.

**Box 3-4: Measures of investment and performance in Elite Sport delivery system**

- 1 Financial support
- 2 Integrated approach to policy development
- 3 Participation in sport (see Section 3.2)
- 4 Talent identification and development system
- 5 Athletic and post-athletic career support
- 6 Training facilities (see Section 3.3)
- 7 Coaching provision and coach development (elite is covered in this section; non-elite is covered in Section 3.3.)
- 8 International competition
- 9 Scientific research

**(i) Legacy programmes and initiatives**

Legacy programmes selected for consideration as contributing to the generating of elite success are those relating to the critical success factors for elite sport identified within the SPLISS framework which were adopted for reporting in Reports 1 to 3. Programmes and projects which may therefore be regarded as Legacy initiatives are summarised under the SPLISS headings relating to these critical success factors.

**(ii) Evidence available: Outputs & expenditure**

Based on UK Sport expenditure data:

- £24 million was spent on an enhanced talent identification and development system, Talented Athlete Scholarship Scheme (TASS) between 2003 and 2010;
- An additional investment of £900,000 was made per annum between 2009 and 2012 on performance lifestyle support.

The table below provides an indication of outputs for elite sport.

**Figure 3-27: Elite Sport outputs achieved**

Legacy programme/ initiative	Lead Organi- sation	Total Outputs/ KPI Achieved		Target
		Output	Time Period	
Enhanced Talent Identification and Development System eg TASS	UK Sport & EIS	<ul style="list-style-type: none"> <li>• 21 of the British Medallists in Beijing and sole Vancouver medallist current or former TASS Athletes.</li> <li>• 55 TASS supported Athletes won 85 medals at the Commonwealth Games in Delhi</li> </ul>	2003-10	n/a
Elite Coach Development <ul style="list-style-type: none"> <li>• Elite Coach Programme</li> <li>• Elite Coach Apprenticeships</li> <li>• Fast Track Practitioners Programme</li> </ul>	UK Sport	<ul style="list-style-type: none"> <li>• 32 elite coaches;</li> <li>• 12 Elite Coach Apprentices;</li> <li>• Over 100 Fast Track Practitioners</li> </ul>	All three programmes launched in 2004 and on-going	n/a
International Leadership Programme (ILP)	UK Sport	<ul style="list-style-type: none"> <li>• 36 graduated from the ILP: 17 currently hold posts of influence within International Federations</li> </ul>	2006 to on-going	n/a
World Class Events Programme	UK Sport	<ul style="list-style-type: none"> <li>• Between 2000 and 2003 – an average of 7 events per year, at an average rate of £133,000</li> <li>• Between 2004 and 2010 – an average of 14 events per year, with an average financial support of £203,000<sup>40</sup></li> <li>• 41 out of 46 of Britain's summer Olympic and Paralympic sports will have staged one major World or European level competition 2006-12</li> </ul>	2000-2010	To have as many NGBs as possible experience home advantage in world or other major championships.
World Championship and Major International Events in Pre-Olympic Year	NGBs	<ul style="list-style-type: none"> <li>• 50 medals obtained in Olympic sports compared with 42 medals gained in 2007 with a similar events calendar.</li> <li>• 12 medals were also gained in the other major championships category</li> </ul>	2011	<ul style="list-style-type: none"> <li>• Medals in the range of 30-61</li> <li>• Medals in the range 4-9</li> </ul>

Source: Grant Thornton Research and Analysis.

<sup>40</sup> Published data changed in 2005 from what was actually spent to the maximum that was committed for any given event.

2012 Olympic Games medals analysis

As suggested in Reports 1 to 3, the key performance indicator for elite sport is the medals table. The following medals analysis provides a high level review of Team GB's medals success in London 2012 and from Sydney 2000 through to London 2012. Team GB finished in 3rd place in the medals table at the 2012 Games as shown below.

**Figure 3-28: London 2012 medals table (top 10)**

Rank	Country	Gold	Silver	Bronze	Total
1	United States	46	29	29	104
2	China	38	27	22	87
<b>3</b>	<b>Great Britain &amp; N. Ireland</b>	<b>29</b>	<b>17</b>	<b>19</b>	<b>65</b>
4	Russian Federation	24	25	33	82
5	South Korea	13	8	7	28
6	Germany	11	19	14	44
7	France	11	11	12	34
8	Italy	8	9	11	28
9	Hungary	8	4	5	17
10	Australia	7	16	12	35

Source: Various websites.

The 2012 Games position is an improvement of one position on 2008 and seven positions on 2004 and 2000 when it finished in 10th place (Figure 3-29). It should be noted that the primary medal table ranking criterion is the number of gold medals won. Other measures of success include total medals won, total points obtained (on a 3, 2, 1 scale for gold, silver and bronze respectively) and market share (points gained/total points awarded) which takes into consideration changing events as the Olympic Games evolve.<sup>41</sup>

**Figure 3-29: Team GB medal stats (2000-2012)**

Year	Rank	Gold	Silver	Bronze	Medal total	Points Gold=3 Silver=2 Bronze=1	Total points awarded	Market share**	Total funding (£'000's) *
2000	10	11	10	7	28	60	1829	3.3%	58,900
2004	10	9	9	12	30	57	1832	3.1%	70,000
2008	4	19	13	15	47	98	1865	5.3%	235,103
2012	3	29	17	19	65	140	1870	7.5%	264,143

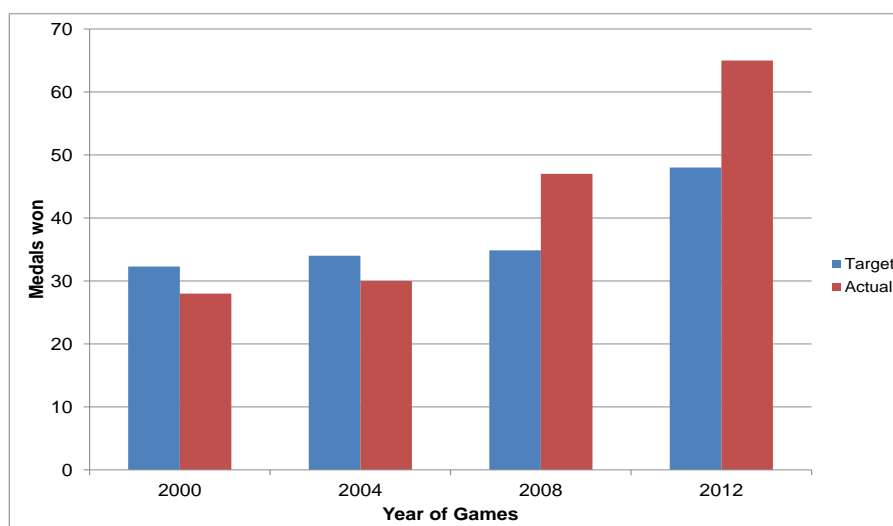
\* Funding allocated to NGBs by UK Sport (funding awarded eg 2012 is funding for 2009/10 to 2012/13).

\*\* Market share is points divided by total points awarded.

Source: Various websites.

Figure 3-30 shows that in the 2012 Games, Team GB exceeded its minimum medal target of 48 by 17 medals (35%). This is comparable to 2008 (12 medals over target; 34%) and a significant improvement on both 2004 and 2000 when GB won fewer medals than targeted (4 and 4 fewer respectively).

<sup>41</sup> It should be noted that it is not possible to achieve a 100% market share in many events and sports since a country may be restricted to one or two athletes per event and thus cannot win gold, silver and bronze.

**Figure 3-30: Team GB medals targets versus actual**

Source: UK Sport.<sup>42</sup>

This 2012 (and 2008) success has been driven by a number of factors highlighted in the discussion above on the SPLISS pillars, many of which will have been made possible or at least have been facilitated by the increase in funding since London won the bid for the 2012 Games in 2005.<sup>43</sup> Combined UK Sport funding for the 2008 and 2012 Games for Team GB was around £500 million, which is an increase of around £370 million on the combined funding for the 2000 and 2004 Games. As well as funding, the 'hosting' effect will have had an impact on success and this is discussed later in this section.

The increase in UK Sport funding since London won the 2012 Games bid in 2005 has been used to resource the activities which have led to greater success. However, cost per medal has also shown a significant increase, even in real terms, (Figure 3-31 below) which is probably due to diminishing returns, where the cost of each additional medal is greater.

Moreover, a number of sports have only been funded since the UK won the bid; handball and volleyball have only attracted UK Sport funding in the past two cycles and only competed at London as the UK utilised host nation places. Funding was not necessarily invested with the expectation of winning medals but to enhance credible performances (neither of these sports were set a minimum target of receiving a medal<sup>44</sup>). The allocation of funding within the NGBs and any additional funding benefits obtained in excess of the UK Sport funding pot will be discussed further in Report 5.

**Figure 3-31: Team GB cost per medal**

Year	Total funding (£000's) *	Medals won	Cost per medal (£000's)	Real** cost per medal (£000's)
2000	58,900	28	2,104	2,826
2004	70,000	30	2,333	2,934
2008	235,103	47	5,002	5,698
2012	264,143	65	4,064	4,208

Source: UK Sport. \* Funding allocated to NGBs by UK Sport (funding awarded eg 2012 is funding for 2009/10 to 2012/13).

\*\* Real Cost per medal adjusts for inflation, using the HM Treasury GDP deflators (averaged over the 4 years leading up to each Games) with a base year of 2012.

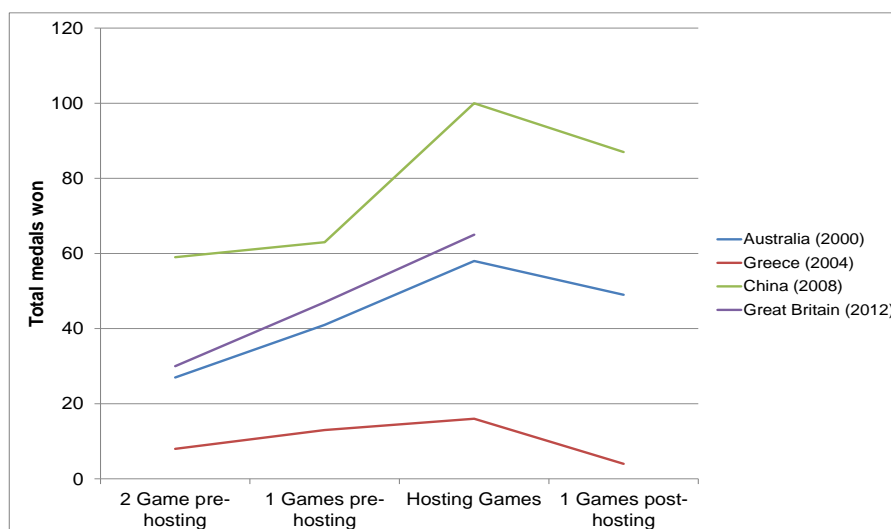
<sup>42</sup> The medals target strategy has changed over the 2000 to 2012 Games period. 2012 was the 1<sup>st</sup> year where a target range was introduced (ie min 40, max 70, average 55) with a published minimum of 48 medals as the target (roughly 85% convergence on the average). In 2008 the 'stretched' target was 41 medals with a convergence of 85% giving an equivalent minimum target of 35 medals. An overall medals target was not set for 2000 and 2004 - rather the total of the targets by sport were given. However using the same convergence of 85%, comparable figures of 32 and 34 respectively have been calculated.

<sup>43</sup> It is intended that Report 5 will incorporate a detailed discussion of NGB perceptions of the uses of the additional funding by the NGBs, and their perceived effectiveness.

<sup>44</sup> Mission Control Milestone Targets 2012 – Olympic Sports ([www.uk sport.gov.uk/docLib/London2012OlympicTargets.pdf](http://www.uk sport.gov.uk/docLib/London2012OlympicTargets.pdf))

It is well documented that there is a 'hosting' effect where countries that host the Olympic Games perform better, before, during, and after their home Games. This effect is illustrated in Figure 3-32 where a clear trend is visible. Each hosting nation of the Games has a pre-hosting increase in medals success as well as a further increase in the year that they host their home Games.<sup>45</sup> Although there is a decrease in performance the year following a home Games the success is usually seen to be greater than that prior to winning the bid. So far Team GB have followed this trend.

**Figure 3-32: Medals won pre-Games, Games and post-Games**



Source: UK Sport.

The Government announced on 12 August 2012 in the wake of the 2012 Games success that funding levels for elite sport from public funds and National Lottery will be maintained, though inflation and the potential reduction in commercial funding will probably imply a reduction in overall funding in real terms.

#### Paralympic Games medals analysis

Paralympics GB's total medal count also exceeded the target of 103 medals and represented the second highest total for all competing nations in 2012. The actual placing in the medal table based on numbers of gold medals, however, fell from 2<sup>nd</sup> to 3<sup>rd</sup> (see Figure 3-33).

**Figure 3-33: Top 10 medal nations in Paralympic medals won 2012**

Rank	Nation	Gold	Silver	Bronze	Total
1	China	95	71	65	231
2	Russian Federation	36	38	28	102
<b>3</b>	<b>Great Britain</b>	<b>34</b>	<b>43</b>	<b>43</b>	<b>120</b>
4	Ukraine	32	24	28	84
5	Australia	32	23	30	85
6	United States	31	29	38	98
7	Brazil	21	14	8	43
8	Germany	18	26	22	66
9	Poland	14	13	9	36
10	Netherlands	10	10	19	39

Source: Various websites.

<sup>45</sup> UK Sports pre-Games analysis of the impact of home advantage on performance in world championships suggests that home advantage had **not** been associated with enhanced performance in the cases of track cycling, triathlon, modern pentathlon and basketball in recent world championships, there have been significant advantages experienced in many of the other sports evaluated in this study, although identifying a pattern of such advantage across the types of sport provides little insight except in relation to "those water-based sports where environmentally-variable conditions may provide the host country with an advantage due to familiarity with the 'field of play'. Canoe slalom, sailing and rowing all demonstrate average performance increases of 25% or more for the host country." UK Sport (n.d.) *Home Advantage The Performance Benefits of Hosting Major Sporting Events*. It should be acknowledged that in addition to the general home advantage for elite competition, the size and significance of the Olympics means that there may be a specific Olympic effect.

Britain's market share of all medals won at Paralympic Games since 2000 has remained very stable thus the 'hosting' effect is less evident than one might perhaps expect. However, it is generally acknowledged that competition at the Paralympic level is increasing in terms of the numbers of countries participating, the growing intensity of preparations and the number of countries with developed athlete preparation systems. The difficulty of securing medals, especially gold medals, has therefore increased. GB's performance in terms of gold medals won is below that of every Games since 2000 (see Figure 3-34). It may be the case that the counterfactual (the Games not being held in London) may well have resulted in more significant loss of position on the medals table.

**Figure 3-34: GB medal outcomes and market share for the 2012 Paralympics**

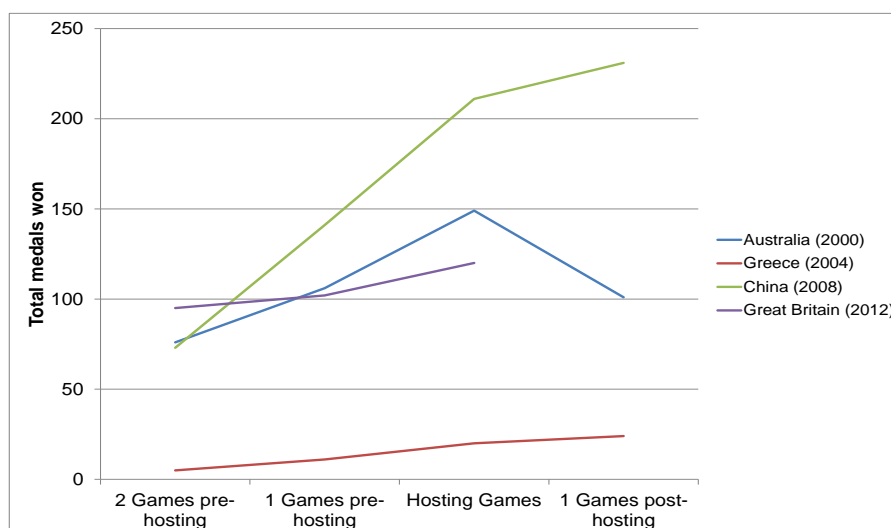
	2000	2004	2008	2012
GB market share	7.7%	6.2%	7.6%	7.6%
GB total medals won	131	94	102	120
GB Gold medals won	41	35	42	34
GB place in table	2	2	2	3
Top Nation	Australia	China	China	China
Market share of top 3 nations combined	23.4%	20.9%	30.9%	30.9%

Source: Various websites and Grant Thornton analysis.

The dominance of China's performance and its effect in producing a 'medal squeeze' is evident from Figure 3-33 and Figure 3-34.

The pattern of medal performance (Figure 3-35) of China as a host is slightly different from other host nations in that China was successful in not only maintaining but also improving its performance in the post-hosting games. The same is true for Greece although Greece started from a relatively low base in terms of medals won (from 5 two games prior to hosting to 20 when hosts, and 24 in the post-hosting Games).

**Figure 3-35: Impact of hosting the Games on medal outcomes for the Paralympics**



Source: Various websites and Grant Thornton analysis.

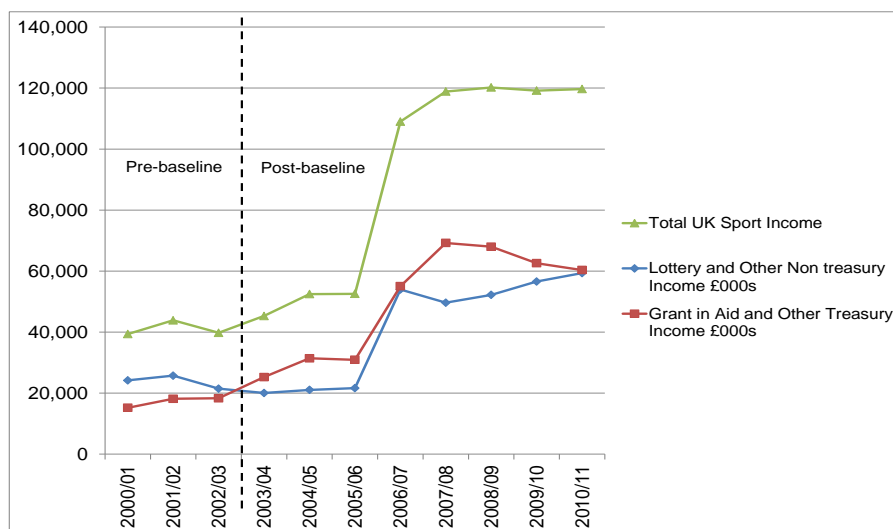
### (iii) Evidence available: Evaluation and research

#### *Financial Support for Elite Sport*

Financial support for elite sport is channelled through UK Sport. A significant increase in funding is evident in 2006/07, after the UK won the bid in 2005; the Government announced an additional £200 million of Exchequer funding in March 2006 (see Figure 3-36), as well as a transfer of responsibility of functions (and funding) of the English Institute of Sport and the

TASS from Sport England to UK Sport. This influx of additional funding was used to resource increased investment in the various programmes discussed below.

**Figure 3-36: UK Sport funding**



Note: Sport is defined as at least once a month and includes physical activity (except recreational walking and cycling) except for any intensity which includes recreational walking and cycling).

Source: UK Sport.

#### Developing an integrated approach to Elite Sport policy development

The World Class Performance Programme was introduced in 1997 to support the UK's most talented athletes in realising their potential. A variety of 2012-specific programmes have been developed, targeting athletes, coaches and future leaders.

Responsibility for the World Class Performance Programme was consolidated under UK Sport in 2006, with UK Sport indicating that this resulted in a simpler more efficient system with ease of progression, and is seen as a major factor in the improvement of UK performance.<sup>46</sup>

In addition to the athlete development system, 'Mission 2012' was introduced immediately prior to the Beijing Games to enhance the performance of the NGBs in fostering the production of elite performers. Mission 2012 was set up to understand barriers to success at the 2012 Games and begin overcoming these. A total of £310 million will be invested over the 2008/9 to 2012/13 period to support achievement at the Games.

Mission 2012 was developed as a self-assessment and performance enhancement tool for NGBs, monitoring the self-assessment of each of the NGBs across 30 indicators, which represent critical factors in three dimensions for a world leading performance system:

- Athletes: their performance, development, health and well-being;
- System: the places, structures, processes, people and expertise that deliver the programme;
- Climate: the feel, functionality and culture experienced by athletes and staff.

Monitoring takes the form of a 'traffic light' for each performance dimension and a judgement about the readiness of the sport's programme as a whole. Submissions to the Mission 2012 Board take place three times per year for all summer and winter Olympic and Paralympic sports.

In relation to issues of additionality, UK Sport staff report that the most sophisticated elite sport systems in sports such as rowing and cycling probably benefit least from this system since they already employed a positive approach in these areas, although even here tighter

<sup>46</sup> UK Sport (2010). Making the Case for Elite Sport: Evidence and Research to Demonstrate the Impact and Wider Effect of UK Sport's Activities and Responsibilities. London, UK Sport (unpublished).



accountability and formalised self-assessment have helped reinforce good practice. UK Sport staff perception is that others have made more significant progress.

With London's hosting of the 2012 Games, GB qualified for representation in many sports for which it had no recent history of competing at the highest level (eg handball and volleyball). The greatest contribution however, is projected to be in the sports with more recent tradition of competing at world level. For example, sports such as triathlon and taekwondo, which have both competed at the Olympics since 2000), have engaged actively with the Mission 2012 process and had medal success at London 2012.

These initiatives are extensions of approaches already in place prior to 2003 but reportedly pursued with greater intensity because of the increased resourcing provided for 2012.

Project-level indicators of improved performance to illustrate additionality would require evaluation of athlete experience of the new world class athlete development system. While the detailed criteria against which NGBs are evaluated for Mission 2012 are confidential there is evidence in the form of increasingly positive evaluations of NGBs across the range of indicators reflected in a diminishing number of 'red' evaluations and an increasing number of 'greens'.

#### Enhancement of the talent identification and development system

There are two key sets of initiatives:

- The TASS student athlete support system;
- Cross sport talent identification systems.

TASS was initiated in 2003 and by 2010 had invested £24 million and awarded 6,000 scholarships delivered at 70 educational institutions, with 13 hub universities. At the Beijing Games in 2008, TASS Athletes and Alumni won 19 medals (15 at the Olympics, four at the Paralympics). At the Vancouver Winter Olympics in 2010, the only GB medallist (Amy Williams) was a former TASS grant holder and 55 TASS supported athletes and alumni won 85 medals at the 2010 Commonwealth Games in Delhi.

The UK Talent Team initiatives include schemes such as Talent 2012 & Paralympic Potential, Fighting Chance, Tall and Talented, Girls4Gold, Pitch to Podium, Sporting Giants and Talent 2016 Throws.

More than 180 athletes identified by the UK Talent Team (UK Sport and English Institute of Sport (EIS)) through Talent ID campaigns such as Sporting Giants entered world class talent development programmes. Eighty-six international medals at junior, U23 and senior level, have been won by athletes discovered on UK Sport Talent ID programmes to date.

#### Athlete lifestyle and post athletic career support

Prior to 2009, the UK Sport Performance Lifestyle Service operated with approximately eight full time equivalent staff with Performance Lifestyle advice being one aspect of a wider role of 'Athlete Support Managers'.

The UK Sport Athlete Survey assesses athletes' evaluation of the relevance and quality of the Performance Lifestyle Service provided, as well as their level of usage. It identified the fact that the service was positively valued but underused leading to an overhaul of the way the service is provided as well as a growth in funding.

Thus in 2009 an additional sum of approximately £900k was provided (for English, Scottish and Welsh Institutes but with approximately 90% going to the EIS) and the number of Performance Lifestyle Advisors rose to approximately 15 full time equivalents. The role of Performance Lifestyle Advisor was defined and recognised (independently of the generic Athlete Support Manager role), with funding ring-fenced within EIS budgets rather than services being bought in by sports on a 'needs' basis. This is intended to avoid the situation of athletes and NGBs valuing the service but not prioritising it in funding because it represented a marginal cost.

The major improvement of performance in Beijing was achieved prior to provision of this additional funding and the introduction of a more tightly defined set of roles, and thus performance in the 2012 Games will provide input into the impact of this. Evaluation of the impact of the programme on athlete performance, health and well-being in the post 2012 Games context, where athletes will have been subject to the new system and its impact, will be important. UK Sport and the EIS have been conducting such a review in 2011/12 though the results are confidential at this stage.

#### Elite coach and leadership development

There are two key sets of initiatives:

- Elite Coaching and Practitioner initiatives;
- International Leadership Programme.

The Elite Coaching and Practitioner initiatives include the Elite Coach Programme, the Elite Coach Apprenticeship Scheme and the Fast Track Practitioner Programme (for young sports science and medicine practitioners) and were all launched in 2004. To date they have produced 32 Elite Coach Graduates, the 12 Elite Coach Apprentices and over 100 Fast Track Practitioners.

The International Leadership Programme was instigated in 2006 and is part of a wider strategy by the International Influence Team which "*invests £800,000 pa in support of targeted NGB international relations strategies providing guidance, support and evidence bases to underpin that. It also runs the International Leadership Programme which develops those with the potential to reach high positions within the governance and administration of international sport.*"<sup>47</sup>

In the first three years of operation, 36 people graduated from the International Leadership Programme of whom 17 currently hold posts of influence within international federations. The annual funding of the programme for 2009 was £55,000.

In addition to the International Leadership Programme, in 2009/10 UK Sport invested £555,000 into 33 NGB International Influence Strategies (an average of £16.8k per NGB. A total of 62 individuals were elected, re-elected or appointed to positions of influence in international sporting bodies in 2009).

#### International competition

The World Class Events Programme was established in 1998 but investment accelerated post 2003. Between 2000 and 2006, an average of 7 events were attracted, increasing to an average of 20 events per year from 2007 to 2010. In addition, 41 out of 46 of Britain's summer Olympic and Paralympic sports will have staged at least one major World or European level competition in the UK in the six years preceding the 2012 Games. The hosting of major championships has a significant impact on the success of home athletes.

In terms of expenditure, the nature of the published figures changed in 2005 from what was actually spent to the maximum that was committed for any given event. With this caveat in mind, data indicates an increased level of commitment averaging £203,000 per event from 2007-2010 compared to £151,000 for 2000-2006. This represents a shift from a mean of £1.05 million (2000-2006) to £4.06 million per annum (2007-2010).

#### Scientific research

The key programme related to scientific research is the UK Sport Research and Innovation programme. This has incorporated a range of projects which have made a direct contribution to the enhancement of performance, particularly in key medal winning sports in Beijing.

<sup>47</sup> UK Sport Annual Report 2010.

Projects on track testing, design and experiments with track cycling, rowing, canoeing and skeleton bob (Winter Olympics) in which medals were won illustrate the nature of the contribution made at Beijing.

Baseline funding for the period pre-2005 stood at approximately £750,000 but rose to approximately £2 million in 2006/07.

**(iv) Conclusions: Outcomes and additionality**

Combined UK Sport funding to the NGBs for the 2008 and 2012 Games for Team GB was around £500 million, an increase of around £370 million on the combined funding for the 2000 and 2004 Games. This increased funding is likely to be one of the key factors, along with home advantage, that has led to success with Team GB finishing in 3<sup>rd</sup> place in the medals table at the 2012 Games, exceeding its medal target by 17 medals (35%). This is an improvement of one position on 2008 and seven positions on 2004 and 2000 when it finished in 10<sup>th</sup> place. Results from the Paralympic Games show a total GB medal count of 120 which was in excess of the target set of 103, although GB feel in the overall medal table fell from second in Beijing 2008 to third.

It is also worth noting that in terms of establishing a sustainable legacy beyond 2012, performance in future Games will be relevant to making a judgement about whether a sustainable long term legacy in relation to elite sport performance has been maintained. Thus performance in Sochi 2014, Rio 2016 and subsequent Games will have a bearing.

UK Sport, in preparing for Rio, anticipates adopting targets which would sustain the level of performance which it intended to achieve in the 2012 Games. As such this would be the first time a hosting nation had been able to sustain its 'home Games' medal performance in the post-hosting period. For previous hosts there has been a pattern of a preliminary peak in numbers of medals obtained, or proportion of medal share, during the Games immediately pre-hosting, followed by a higher peak in the hosted Games. This is followed by a subsequent falling away in the Games post-hosting, so even a lower level of achievement could be a sign of a sustainable legacy.

**(v) Progress in answering the research questions**

Based on the evidence presented above, we have included below the extent to which the research questions for elite sport can be addressed at this stage.

***To what extent and in what ways has hosting the 2012 Games been a catalyst for achievement in elite sport in the UK (including through identifying and nurturing talent)?***

Since winning the bid to host the Games, there has been significantly more investment in elite sport, with the Government committing £200 million of Exchequer funding in March 2006. This has contributed to Team GB and Paralympics GB both finishing in 3<sup>rd</sup> place in the medals table at London 2012 for the Olympic and Paralympic Games respectively, both exceeding their medal targets.

The approach adopted for elite success was established in the post Atlanta 1996 Games period when Great Britain had performed particularly poorly. However additionality has been obtained by the intensification of activities planned and funded in the period after the baseline year of 2003, such as increased exposure of athletes to international competition, the hosting of major international events to promote a culture of success and familiarise athletes with home environment. In particular new initiatives in cross-sport talent ID and development programmes (eg Pitch to Podium, Sporting Giants) which were developed in the post-baseline period have been successful in both identifying and developing talent to the point of international success. Detailed consideration of factors associated with success in particular sports in Report 5 will assist in further addressing this question.

***To what extent has there been an increase in young, talented disabled athletes being identified and nurtured (from school to elite competition level), as a consequence of the 2012 Games?***

The principal talent identification and development programmes relating to Paralympic and disability sport were Playground to Podium and Talent 2012: Paralympic Potential. The first

School Games national event also gave 167 talented young disabled athletes (11.6% of the total athletes) the chance to compete at the Olympic Park.

An evaluation of the Playground to Podium initiative, which fell under the PESSYP programme, was planned, but this was delayed and it is unknown if/when it will be available.

For Talent 2012: Paralympic Potential, the first three months of the programme resulted in 300 applications with 200 being tested for individual sports and, of these, 26 athletes were invited onto the talent confirmation programmes for archery, athletics, boccia, cycling, judo, rowing and shooting.

***To what extent have elite UK sporting achievements (as a consequence of the 2012 Games and legacy investments) impacted on national pride and well-being?***

Great Britain elite sporting achievement levels have continued to improve since the baseline period with success in Beijing significantly exceeding the Athens performance and World and International Championship performance in pre-Olympic year 2011 significantly exceeding that of 2007. The UK sporting achievements during the 2012 Games have been in excess of medal targets, both in the Olympic and Paralympic Games.

Survey data relating to the public reaction to performance in Beijing<sup>48</sup> indicates that the majority of the population felt pride in the national Olympic and Paralympic performance. In answer to the question: "*the success of British athletes at the Beijing Olympics and Paralympic Games made me feel proud about Britain generally*", 72% agreed (of which 42% strongly agreed) with small differences between genders or socio-economic status groups. 76% of those aged 35 or over indicating that they agreed or strongly agreed with the statement as against 66% of those under the age of 35, and 75% of white respondents compared to 57% of non-white respondents.

Preliminary evidence to date, in the form of media coverage, including for example the parade for Olympics and Paralympics GB teams on 10 September 2012, suggests that the impact on national pride and well-being has been positive, however, the legacy impact will only be seen over time and will be reported on in more detail in Report 5.

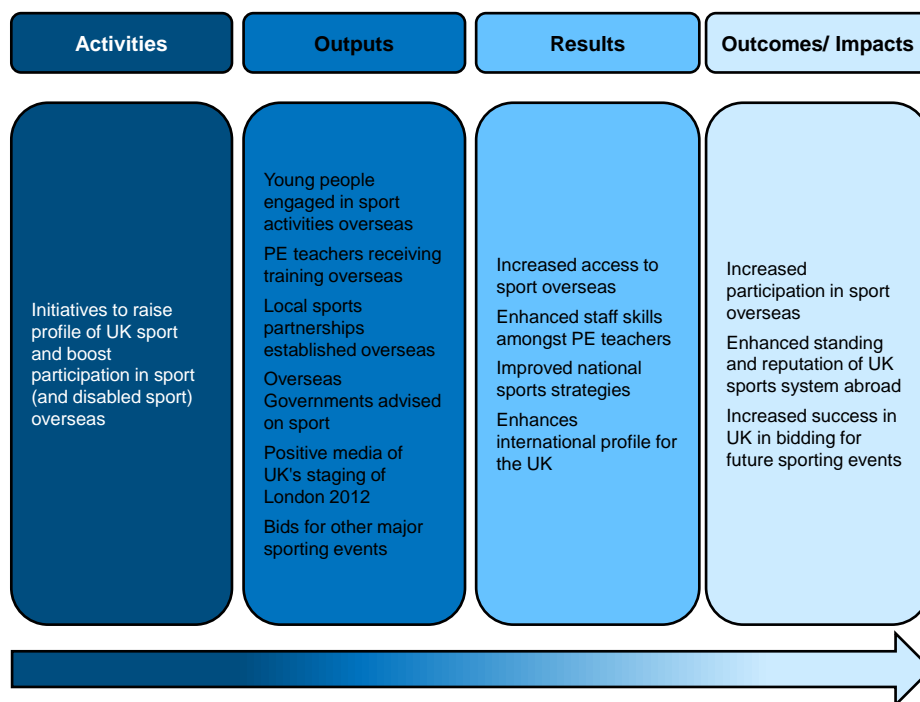
<sup>48</sup> UK Sport, *UK Sporting Preferences 2008*, UK Sport: London.

### 3.5 International

#### (i) Legacy programmes and initiatives

The key legacy programme associated with the international sub-theme is International Inspiration. However, some of the other programmes and investments have also helped to drive the international agenda, for example some of the initiatives and activities such as PGTCs detailed in Section 3.3. The figure below summarises the logic model for the international sub-theme.

Figure 3-37: International summary logic model



International Inspiration was announced by the then Prime Minister in India on 21 January 2008, bringing into reality the 'Singapore Vision', ie the promise made by the London 2012 bid team to "*reach young people all around the world and connect them to the inspirational power of the Games so they are inspired to choose sport*".<sup>49</sup>

The aspiration is to reach 12 million children in 20 countries. The programme aims to use the power of sport to enrich the lives of millions of children and young people of all abilities, in schools and communities across the world, particularly in developing countries, through the power of high quality and inclusive physical education, sport and play. This will not only deliver the ambitions promised in Singapore – and contribute to the achievement of the Millennium Development Goals – but will also set the foundations for a true international legacy from the 2012 Games.

International Inspiration has received the formal backing of the International Olympic Committee and the International Paralympic Committee. This is the first time an Olympic Games Organising Committee has undertaken an international legacy programme of this kind.

#### (ii) Evidence available: Outputs & expenditure

International Inspiration has the goal of reaching 12 million children and this was achieved in July 2011.<sup>50</sup> The table below highlights the key achievements in 20 countries involved, and the UK.

<sup>49</sup> UK Sport website.

<sup>50</sup> International Inspiration Annual Review 2010-11.

**Figure 3-38: Key achievements of International Inspiration**

	Country	Started	Key Achievements
1	Brazil	2007	<ul style="list-style-type: none"> <li>• More than 460,000 children took part in 625 sports festivals</li> <li>• Local governments increased the number of qualified PE teachers in 26 municipalities</li> <li>• 33,500 teachers and young leaders trained through 80 workshops in the final year of the programme</li> <li>• Young people involved in developing a child-friendly legacy for the 2016 Games</li> <li>• Successful school links to be sustained</li> </ul>
2	India	2007	<ul style="list-style-type: none"> <li>• Training adopted by the Government integrated into the curriculum of all 10,600 centrally run schools</li> <li>• 1,700 teacher training institutes committed to using physical education cards (PEC) (a version of TOP – a range of tailored curriculum materials, equipment and in-service training for teachers to assist them in delivering high quality and inclusive PE )</li> <li>• PEC ability, specially designed for disabled children, used to train 7,500 community coaches in 150 districts in India</li> <li>• More than 30,000 community coaches trained working with an estimated 1.5 million children in rural communities across India.</li> </ul>
3	Azerbaijan	2007	<ul style="list-style-type: none"> <li>• 55,000 children and young people involved in regular PE and sport</li> <li>• More than 260 peer educators trained, sharing information with 4,500 of their peers</li> <li>• Summer camps organised for 80 girls and 120 boys from 30 districts</li> <li>• 55 schools and youth clubs involved in projects</li> <li>• 6 schools and the UK continue to work in partnership using sport as a tool for learning</li> <li>• Two new pieces of legislation protecting the rights of all children to play and take part in sport introduced</li> </ul>
4	Zambia	2007	<ul style="list-style-type: none"> <li>• 160,000 children took part in sports events</li> <li>• 780 teachers trained to deliver quality, fun and engaging sport and play activities</li> <li>• 900 young leaders trained</li> <li>• 430 innovative radio discussions broadcast on the subject of sport and healthy lifestyles reaching more than 2.5 million people</li> <li>• 185 listening clubs provided</li> <li>• Olympic Youth Centre continues to provide high-quality sport through school-club links</li> </ul>
5	Palau	2007	<ul style="list-style-type: none"> <li>• Over 100 young leaders trained to plan, organise and run events, with a further 25 trained every summer</li> <li>• Ministry of Education of Palau and PNOC sign a joint MoU to ensure sustainable systems are kept in place to support the development and delivery of PE in schools</li> <li>• Elementary after-school sports clubs set up</li> </ul>
6	Bangladesh	2009	<ul style="list-style-type: none"> <li>• Over 80,000 children have learnt vital swimming skills from 784 community swimming instructors in 541 ponds, specifically made safe</li> <li>• 284 sporting and 372 swimming competitions</li> <li>• 946 teachers received TOP PE skills training</li> </ul>
7	Jordan	2009	<ul style="list-style-type: none"> <li>• 4,200 young people, over 50% of which are girls, now playing sport regularly, including disabled young people</li> <li>• 60 women teachers trained as coaches in basketball and athletics, serving as inspiring role models</li> <li>• 110 (60% girls) young coaches trained and leading in all 15 sports hubs</li> <li>• 5 sports federations supported by the Jordan Olympic Committee</li> </ul>

Country	Started	Key Achievements
		drafting 3-year project plans focusing on the inclusion of girls and marginalised children
8 Mozambique	2009	<ul style="list-style-type: none"> <li>• 200,000 children regularly taking part in PE classes and sport</li> <li>• 1,477 teachers in seven provinces trained</li> <li>• 311 specially designed sports kits distributed to schools</li> <li>• A PE manual for primary school teachers piloted and to be sent out</li> <li>• 13 teachers and 7 district officers trained</li> </ul>
9 Trinidad and Tobago	2009	<ul style="list-style-type: none"> <li>• More than 360 young leaders trained to deliver quality PE and sport to their peers</li> <li>• More than 10,000 participants engaged in a wide variety of PE and sport activities throughout the country</li> <li>• Jump Rope for Heart project piloted in 23 schools</li> <li>• Trinidad and Tobago and UK Governments sign a joint MoU pledging continued support for International Inspiration</li> <li>• First ever 'Paralympic School Day and Sports Festival' organised by young leaders</li> </ul>
10 South Africa	2009	<ul style="list-style-type: none"> <li>• Over 300 schools benefitting from sports development projects across the country</li> <li>• 30 schools involved in innovative partnerships with schools in the UK</li> <li>• 200 community volunteers trained to deliver sports coaching and life skills to young people</li> <li>• 111 educators trained to teach life skills and HIV and AIDS prevention through football, netball, rugby and cricket</li> </ul>
11 Nigeria	2009	<ul style="list-style-type: none"> <li>• PE teachers from 28 schools have increased their capacity</li> <li>• Lagos State Education Board committed to extend training to 200,000 children across 900 primary schools</li> <li>• Young leaders organised school sports festivals</li> <li>• Representatives from 28 Nigerian schools visited UK partner schools</li> <li>• Development of a landmark school sports policy underway which will protect the rights of girls and disabled children</li> </ul>
12 Malaysia	2010	<ul style="list-style-type: none"> <li>• Influencing the implementation of two national policies</li> <li>• Over 100,000 school children, including disabled children benefit from activities</li> <li>• All 480 primary schools in the state of Perak run TOP sessions reaching 5,000 teachers</li> <li>• 21 TOP Master Trainers created</li> <li>• Malaysia's '1 School 1Sport' policy designed</li> <li>• Strong government support for the programme</li> </ul>
13 Turkey	2010	<ul style="list-style-type: none"> <li>• 15 school partnerships between Scottish and Turkish schools provide opportunities for children</li> <li>• More than 600 young people and 500 teachers and parents reached through TOP and YSL training</li> <li>• Government support for the programme</li> </ul>
14 Indonesia	2010	<ul style="list-style-type: none"> <li>• 4,000 children experience improved PE lessons, including 800 who have taken part in sports festivals</li> <li>• Famous Indonesian athletes provide support</li> <li>• 110 young leaders trained to run sports festivals</li> </ul>
15 Pakistan	2010	<ul style="list-style-type: none"> <li>• 38 schools visit UK partner schools</li> <li>• 60 teachers, district sports officers and other officials participate in TOP training</li> <li>• 20,000 flood-affected children benefit from International Inspiration in 430 temporary learning centres</li> </ul>

	Country	Started	Key Achievements
			<ul style="list-style-type: none"> <li>• 200 emergency kits distributed to schools and temporary learning centres in flood affected areas</li> </ul>
16	Tanzania	2011	<ul style="list-style-type: none"> <li>• Aspiration is that up to 2 million children and young people will be reached through PE, sport and play activities</li> </ul>
17	Uganda	2011	<ul style="list-style-type: none"> <li>• Main objective is to improve access, quality and engagement of children in sport</li> </ul>
18	Ghana	2011	<ul style="list-style-type: none"> <li>• Aims to ensure more children and young people of all abilities participate in high-quality and inclusive physical education, sport and play. It will also use sport as a tool to develop life skills, to educate young people about HIV and AIDS, fair play and respect, and to empower young people, particularly girls.</li> </ul>
19	Ethiopia	2011	<ul style="list-style-type: none"> <li>• Aims to use sport to promote inclusion by reaching girls and marginalised children, including disabled children and provide leadership training to young people.</li> <li>• Schools in the UK will also be linked to schools in Ethiopia so that they can share best practice, culture and learning.</li> <li>• To mark the launch of International Inspiration in Ethiopia, 4,000 children from local schools and youth centres participated in a race in association with the organisers of the Great Ethiopian Run, including 200 who took part in a special International Inspiration race.</li> </ul>
20	Egypt	2012	<ul style="list-style-type: none"> <li>• Aspiration to enrich young people's lives through sport, by providing access to sporting opportunities</li> </ul>
21	United Kingdom	2007	<ul style="list-style-type: none"> <li>• 270 schools linked to partner schools around the world</li> <li>• 22 out of 42 young leaders, volunteered at the UK School Games</li> <li>• 5 International Inspiration ambassadors spread the message around the world</li> </ul>

*Source: International Inspiration Annual Review 2010-2011, International Inspiration Brochure, Transforming Lives Through Sport, London 2012 Website (<http://www.london2012.com/join-in/education/international-inspiration/where-is-it-happening/>)*

It is apparent that International Inspiration has made a significant impact in the countries concerned across a range of areas including increased sport participation, more coaches/teachers trained, changes to PE curriculum, school partnerships formed, young leaders trained and policy changes and developments. There has also been a focus on women/girls and disability, currently issues in many of the countries involved.

The evaluation of International Inspiration is seeking to obtain detail on cost and overall impacts by country (eg number of children that have participated in sport, number of coaches trained etc.)

### (iii) Evidence available: Evaluation and research

An evaluation report<sup>51</sup> of Phase I of International Inspiration relates to the programme in Azerbaijan, Brazil, India, Palau and Zambia.

Appendix A provides an overview of what has and hasn't worked in the various countries, based on the following core themes:

- Policy development in sport and education;
- Organisational development in sport;
- Social inclusion through sport;
- Promotion of safe and healthy lifestyles;

<sup>51</sup> Evaluating the Implementation and Impact of the International Inspiration Programme Phase 1 – Final Report, Loughborough Partnership – Centre for Olympic Studies & Research and Institute of Youth Sport, Loughborough University (with the School of Sport, Stirling University).



- Promotion of inter-culturalism;
- Development of safe places;
- Development of young people as leaders and peer educators;
- Need for core partners to be embedded within appropriate local structures.

**(iv) Conclusions: Outcomes and additionality**

International Inspiration has generated some significant impacts, with the target of 12 million children reached in July 2011. Benefits/impacts include:

- Increased sport participation;
- More coaches and PE teachers trained;
- Changes to the PE curriculum in some countries;
- Partnerships formed between schools in different countries;
- Young leaders trained;
- Policy changes and developments.

Many of these benefits have focused specifically on girls and women, and disabled people. The longer term legacy of these impacts will need to be evaluated, with International Inspiration's focus now on ensuring the programme is sustainable.

**(v) Progress in answering the research questions**

Based on the evidence presented above, we have answered, as far as currently possible, each of the different research questions below:

*To what extent has sport been used to achieve international development goals through the 2012 Games, specifically by providing more young people in developing countries with the opportunity to participate in high quality sport through International Inspiration?*

International Inspiration reached 12 million children by July 2011, with a range of participation and other opportunities provided to these children in 20 countries (excluding the UK). In 2010/11, in many developing countries, the impact has been the provision of opportunities for children to participate in high quality sport and PE.

There have been a range of supporting activities and other impacts which have facilitated this participation. These include more coaches and PE teachers trained, changes to the PE curriculum in some countries, partnerships between schools in different countries being formed, young leaders trained, and policy changes and developments to support increased and on-going participation.

Many of the activities are being sustained, with regular participation in sport, indicating a potential longer term legacy in the countries concerned.

*How far has the UK been able to increase its influence on the role of sport in other countries, and on global sporting decisions, because of the 2012 Games or its legacy interventions?*

Through International Inspiration, the UK has been able to increase its influence on sport in other countries. This has taken a range of forms including for example:

- In India, a change in school curricula has been brought about with sport being further and better embedded;
- In Azerbaijan two new pieces of legislation have been introduced protecting the rights of all children to play and take part in sport;
- In Palau, the Ministry of Education of Palau and the Palau National Olympic Committee have signed a joint MoU to ensure sustainable systems are kept in place to support the development and delivery of PE in schools while the Trinidad and Tobago and UK

Governments have signed a joint MoU pledging continued support for International Inspiration;

- In Nigeria, the development of a landmark school sports policy is underway which will protect the rights of girls and disabled children.

In addition, by July 2011 over 270 UK schools were linked to partner schools around the world, providing on-going opportunities to influence the role of sport in other countries. The five International Inspiration ambassadors are also able to influence and bring about change.

***To what extent have the 2012 Games enhanced the reputation of the UK abroad for hosting major sporting events (and made it easier for the UK to win and host future major events)?***

As discussed in the elite sport section (Section 3.4), the number of major sporting events and expenditure has increased as a result of the Games, indicating that the UK's reputation abroad for hosting major sporting events is being enhanced.

Between 2000 and 2006, an average of 7 events were attracted, increasing to an average of 20 events per year from 2007 to 2010. In addition, 41 out of 46 of Britain's summer Olympic and Paralympic sports will have staged at least one major World or European level competition on home soil in the six years preceding the 2012 Games.

In terms of expenditure, the nature of the published figures changed in 2005 from what was actually spent to the maximum that was committed for any given event. With this caveat in mind, data indicates an increased level of commitment averaging £203,000 per event from 2007-2010 compared to £151,000 for 2000-2006. This represents a shift from a mean of £1.05 million per annum (2000-2006) to £4.06 million per annum (2007-2010).

A successful Olympic Games will showcase not only the venues hosting Olympic events as potential host venues for future mega-events, but a range of other venues and facilities which the athletes, coaches and supporters will have access to, including for example the PGTCs.

The Olympic Park venues have already secured international events post-Games, and discussions are underway regarding other potential events.

### 3.6 Summary research question

*What have been the impacts of the Games on sport and physical activity, and in particular the development of mass participation, competitive school and elite sport?*

While the full impacts of sport-related legacy programmes and investments will take time to be fully realised, preliminary monitoring, output and evaluation data indicates that the Games are "*harnessing the UK's passion for sport to increase school-based and grassroots participation in competitive sport – and to encourage the whole population to become more physically active*".

#### (i) Mass participation

The participation elements of Places People Play as well as School Games, the Government's key sport participation programmes, have provided opportunities for adults and young people from across the regions of England and nations of the UK to participate in sport, with a particular and increasing emphasis on the participation of disabled people.

In addition, PESSYP, although discontinued, did contribute to increased participation. DfE surveys of PESSYP indicate that over the period 2003/04 to 2009/10 participation in PE and out-of-school sport increased, with 55% of pupils in years 1 to 13 participating in at least three hours of high quality PE and out-of-hours school sport in 2009/10. Between 2003/4 and 2007/8, participation was measured for two hours (increasing to three hours in 2008/9) with participation rates increasing from 62% to 90% during this period. The Sport Unlimited strand of PESSYP attracted 1.2 million young people, retaining nearly 82% of these young people. Evidence also indicates that around 300,000 young people's participation was sustained.

Places People Play, through Sportivate, has provided participation opportunities to almost 100,000 young people and is on target to achieve the milestones set. This coupled with School Games, which has over 13,600 schools registered, provides on-going participation opportunities especially given that both Sportivate and School Games are due to run until 2015.

Other legacy initiatives, such as Premier League 4 Sport have provided participation opportunities to young people. Approximately 43,000 young people have been engaged by Premier League 4 Sport, almost double its target, with the programme extended in duration and incorporating additional sports. In addition, 63% of young people that were engaged were then retained (at least 5 sessions per term), with 27% of young people sustained (at least 10 sessions over two terms).

Many legacy initiatives have facilitated participation in sport and physical activity for the first time, with evidence indicating that this participation is sustained. A survey of Inspire project organisers indicated that their perception is that almost 75% of participants would sustain their involvement in sport after the project.

Other legacy programmes, such as Change4Life Sports Clubs, Walk4Life and Games4Life, have facilitated participation in sport and physical activity, with interim evaluation evidence indicating that this participation is being sustained. Walk4Life has reported that that physical activity levels increased by 0.73 days a week of moderate physical activity for more than 30 minutes for users registered more than 90 days and Change4Life Sports Clubs has reported over 61,000 young people participating with 90% of these choosing to play sport every week at the end of the first year (an increase of 40% when compared to data obtained when joining up). A survey of Inspire project organisers indicates that their perception is that almost 75% of participants would sustain their involvement in sport after the project.

The discontinued Free Swimming did facilitate an increase in participation, however limited additionality was estimated.

According to the latest Taking Part survey data, adult participation levels are the highest since 2005/6, with the following participation rates recorded:

- Active sport participation in the last four weeks increased from 53.7% in 2005/6 to 55.2% in 2011/12;

- 1x30 minute sessions of moderate intensity sport in the last week increased from 41.2% in 2005/6 to 43.8% in 2011/12;
- 3x30 minute sessions of moderate intensity sport in the last week increased from 23.2% in 2005/6 to 25.9% in 2011/12.

The increase in the active sport in the last four weeks measure, which had remained relatively flat between 2005/06 and 2010/11, suggests that the programmes may have taken time to become embedded and to result in noticeable changes across participation.

Taking Part also gives initial evidence of additionality, with 7.3% of those participating in sport and recreational physical activity indicating the Games have motivated them to do more.

When available, evaluations of Places People Play and School Games will provide further insight into the impact of these initiatives on mass participation. In addition, monitoring the longer term trends (through Taking Part for example) will also indicate the extent to which participation increases have been sustained.

In addition to participation-related initiatives, increased participation is also impacted by facilities and softer infrastructure such as coaching, volunteering and club membership. Significant investment at the regional and national level will contribute to creating the foundation for a mass participation legacy.

### **(ii) Competitive School Sport**

Indications are that PESSYP did create a system through which additional and better quality opportunities for young people to participate in competitive sport were provided, with an evaluation of the Competitive School Sport strand of PESSYP revealing that the volume of sport competitions increased, resulting in more young people taking part in competitive school sport. In addition, opportunities were provided for young disabled people, people from different ethnic backgrounds and with good representation by gender.

Monitoring data from the School Games initiative indicates that over 13,600 schools have registered, exceeding the target of 12,000, with 31 competition formats at intra-school and inter-school level developed. In addition, these impacts are realised regionally, with schools from throughout England registered. Level 4 of School Games involves the nations as well. Given that this programme runs until 2015, it has and will continue to provide competitive opportunities for young people, with the foundation laid by PESSYP and other initiatives facilitating this.

School Games, building on the system created by PESSYP and facilitated by other legacy participation programmes should continue to increase the involvement of young people in competitive school sport. The extent to which this has been realised will be further assessed once the evaluation of School Games is available.

### **(iii) Elite Sport**

The development of the elite sport system has been significantly intensified with the introduction of increased funding and subsequent acceleration and refining of support activities, such as the development of elite sport coaching, sport support personnel, sport technology innovation, hosting of major international championships, talent identification and support systems.

The performance of UK athletes in World Championships and major international events in 2011 compared favourably with the equivalent performances in 2007 which preceded the highly successful Beijing medal performance. Results from the 2012 Games show that GB exceeded its medals targets in both the Olympic and Paralympic Games. Team GB finished in third place in the medals table at the 2012 Games, exceeding its medal target by 17 medals (35%). This is an improvement of one position on 2008 and seven positions on 2004 and 2000 when it finished in tenth place. Results from the Paralympic Games show a total GB medal count of 120 which was in excess of the target set of 103 although GB's ranking in the medal table fell from second place in Beijing 2008 to third.

Performance in Rio in 2016 will however be important in determining the extent to which the impact on elite sport has been sustained.

### 3.7 Progress and next steps

The table below sets out evidence which should be available for Report 5 and highlights possible/proposed approaches to addressing any likely evidence gaps.

**Figure 3-39: Evidence for Report 5**

<b>Evidence expected to emerge for Report 5</b>
School Games: Summary report to Sport England by Autumn 2012 with further evaluations planned
Places People Play - Sportivate: First evaluation available with further evaluations planned
Places People Play - Sports Makers: Evaluation available in Autumn 2012
Place People Play - Club Leaders: Evaluation supplier is in place with report dates to be confirmed as these are dependent on programme timings
Place People Play - Disability: An evaluation supplier is in place with report dates to be confirmed as these are dependent on programme timings
Place People Play - Iconic Facilities: Procurement of an evaluation supplier is underway. Report dates to be confirmed
Place People Play - Inspired Facilities: Procurement of an evaluation supplier is underway with report dates to be confirmed
Place People Play - Protecting Playing Fields: Procurement of an evaluation supplier is underway with report dates to be confirmed
Games4Life (Change4Life Summer Campaign): Results available quarter 4 of 2012
International Inspiration: Interim report in Autumn 2012
PGTC Survey: Analysis of PGTC questionnaires during quarter 4 of 2012
<b>Possible/Proposed approaches to addressing the evidence gap in Report 5</b>
Interviews are planned with NGBs during quarter 4 of 2012 to help determine of the impact of the Olympic and Paralympic venues on elite sport both inside and outside London
Assessment of health initiatives and consultation with DH to address the question of the impact of sport on health and well-being

*Source: Sport England, DCMS and Grant Thornton*

## 4 Exploiting opportunities for economic growth

### 4.1 Introduction

This legacy theme is about using the Games to support economic recovery and help generate long-term economic growth. As set out in *Beyond 2012*<sup>52</sup>, the Government aims to capitalise on the Olympic and Paralympic Games as a showcase for UK expertise and use it to open up new exporting opportunities for UK businesses as well as to promote London and the UK to international businesses as a place to invest. The Government is also aiming to use the global exposure that the Games brings to London and the UK to attract new visitors and boost tourism in the long term.

This chapter sets out the interim evaluation of activity related to the economic legacy theme. As with previous meta-evaluation reports the evidence is presented according to the following sub-themes of activity:

- Overall economic impact of 2012 Games;
- Business access to 2012;
- Promoting the UK as a place to invest;
- Export and trade promotion;
- Tourism;
- Employability and skills development;
- Promoting sustainable business;
- Opportunities for disabled people in business and disabled access to transport.

The focus of the analysis is available monitoring data and evaluation findings for activity related to this theme supplemented by qualitative evidence and updates collected through consultations with key stakeholders. It should be noted that evaluation evidence related to this theme is limited at this stage due to a number of key pieces of work being scheduled to report after the Games. It is also worth noting that a significant proportion of the economic outcomes under the key sub-themes of inward investment, exporting and tourism are likely to occur after the Games.

### 4.2 Economic impact of construction spend

There have been numerous studies attempting to estimate the impact of the Games on the economy produced by a variety of different bodies including public bodies, academic institutions and private companies. Ever since London won the right to stage the Games there have been estimates of economic impact produced but as attention has increased in 2012 there has been an increase in the number published and reported on. These studies often report very different impacts, largely because they are looking at very different elements of economic impact but also because they use different methodologies and different underlying assumptions.

A study into the economic impact of the Games for Lloyds (July 2012) estimates a £16.5 billion contribution to UK GDP over 12 years (82% from pre-Games and legacy construction activity, 12% from tourism, 6% from expenditure to stage the Games).<sup>53</sup> 70% of the GDP impact is generated before and during the Games, 30% as part of the legacy with 354,000 job years of employment supported over 2005-2017. This is the most comprehensive study currently

<sup>52</sup> *Beyond 2012 – the London 2012 Legacy Story* (DCMS, March 2012).

<sup>53</sup> Oxford Economic, *What is the economic impact of London 2012*, Lloyds Banking Group.

available, pulling together a variety of different impacts across different periods. However, as a projection of future impacts it by necessity relies on a series of assumptions, particularly on future tourism impacts, which means this part of the estimate is more likely to have a wide margin of error. Moreover, none of the major studies to date have explored the impact of the Games on exports or inward investment, meaning this is currently an unknown area of impact. Data will become available for the meta-evaluation post-Games on the actual tourism impact and impacts on other areas that will enable a more accurate assessment to be made.

For the purposes of this report Oxford Economics has developed a bespoke impact model using input/output frameworks to estimate the economic impact arising from the construction spend on the Games (see Box 4-1 below for an overview of the modelling). This approach provides an accurate and flexible model that enables us to explore impacts by location and time period and understand what is driving the results.

#### **Box 4-1: Macroeconomic modelling of ODA construction spend**

Oxford Economics built a bespoke input-output impact model to estimate the benefits of Olympic construction spend. The approach uses standard industry techniques and lessons from the current academic literature on estimating regional (or sub-national) impacts.

##### **Direct impacts**

ODA spend of £6.5 billion covering the period 2007 to Q1 2012 was used to estimate the direct impacts. ODA financial databases provided information on how this level of spend split across region (and within London) and year. Grant Thornton assigned sectors to the top 117 companies / organisations that received the most funding (accounting for 96.7% of spend), allowing Oxford Economics to split this ODA spend by location, sector and year. The data was then scaled each year to hit the overall £6.5 billion and converted to 2008 prices.

Using ratios of output to GVA the spend data was converted to GVA. Industrial productivity figures for each year and region were then used to estimate direct employment. Average sectoral wages provided an estimate of direct wages.

##### **Indirect impacts**

The indirect impacts are defined as the economic activity and employment supported in the supply chains of those who received the direct spend. Using the latest UK input-output tables and data on the employment structure across regions (along with sectoral productivity and wages), the indirect benefits that arise from the direct spending above was estimated.

##### **Induced impacts**

The induced impact is defined as economic activity and employment supported by those directly or indirectly employed spending their wage income on goods and services. This helps to support jobs in the industries that supply these purchases, and includes jobs in retail and leisure outlets, companies producing consumer goods and in a range of service industries.

##### **Counterfactual**

The modelling compares the impact of the 2012 Games with the counterfactual assumption that the Olympics weren't awarded to London and therefore there was no construction spending on building the necessary facilities. There is no counterfactual assumption about spending the public money used for this on anything else.

##### **Displacement**

Economic impact assessments of this type do, however, typically need to allow for displacement where generated economic activity partly takes the place of other economic activity that would otherwise have been feasible using some of the economic resources involved. In this particular case, the construction activity period occurred during a period of significant contraction across the economy leaving spare capacity to support the generated economic activity without needing to displace significant amounts of other economic activity. Displacement is assumed at between 0% and 70% depending on region, sector and year in 2007 and 0% and 30% depending on region and sector by 2012. The overall displacement as a result of these region, sector and year assumptions is 12%.

A more detailed description of the modelling approach is given in Appendix A in Report 3 and on the choice of modelling approach in Report 2

The model is not a fully dynamic simultaneous model so it requires assumptions to be made around displacement, substitution, etc. rather than these being automatically adjusted for. However, such models do not always provide the level of detail and flexibility required for this project. This model estimates the direct, indirect and induced:

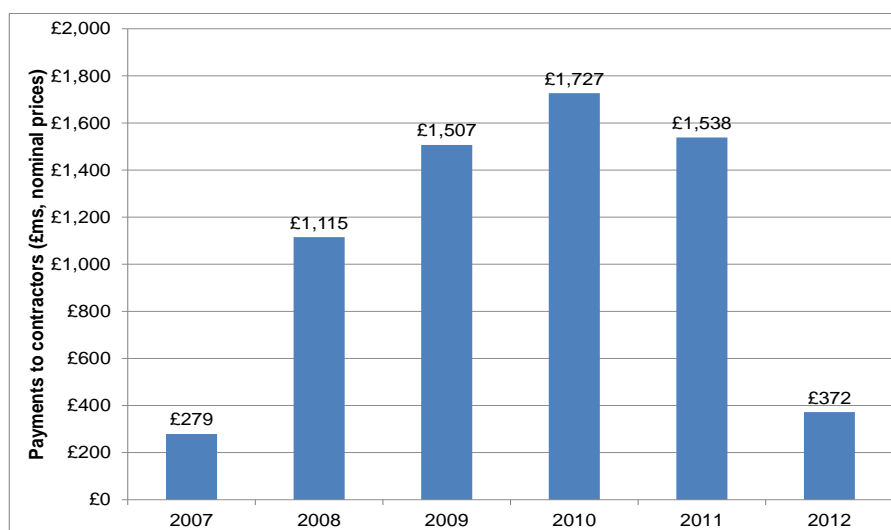
- Output;
- Gross Value Added<sup>54</sup> (GVA);
- Employment;
- Wages.

All impact estimates are available by host boroughs, Rest of London, region, sector and year. As noted below, the estimates are based solely on the £6.5 billion of Olympic Delivery Authority (ODA) spend. The next phase of modelling (likely to be later this year) will include wider Olympic Games related spend.

### (i) Understanding ODA spend

To date the analysis is based on the £6.5 billion of spending by ODA from 2007 to the end of Q1 2012 (Figure 4-1). A detailed breakdown of this information has enabled the analysis to take account of the type and location of construction related spending in the UK.

**Figure 4-1: Profile of ODA spend 2007 to Q1 2012**



Source: ODA.

It should be noted however that ODA spend data is taken from a financial records database. Consequently the location of spend/contracts is taken from the address of the invoices. Therefore the current regional or sub-regional analysis will in some cases show the location of finance departments or company headquarters rather than where the activity actually took place (this is discussed further below).

In addition this £6.5 billion of spend is the value of contracts with 'Tier 1' contractors (ie companies employed directly to provide goods or services). In reality these 'Tier 1' contractors will sub-contract additional private sector companies in their supply chain ('Tier 2' companies), who will in turn sub-contract further down the supply chain (Tiers 3, 4, etc.). The analysis below uses the ODA spend database to model Tier 1 activity but there is currently no data on sub-contractors further down the supply chain. This is mitigated to some extent as the modelling process uses average patterns of spend to account for how money typically flows through the economy. However, to make estimates of regional impacts more accurate some precise data on sub-contractors is currently being pursued.

<sup>54</sup> Gross Value Added (GVA) is a measure of the value of goods and services produced in an area, industry or sector of an economy.



Not all of the £6.5 billion is enjoyed by the UK, though only £12 million was spent via contracts with firms outside of the UK. In addition, all nations and regions of the UK will enjoy supply chain (ie 'Tier 2' and others) and induced benefits from construction spend on the Olympics, regardless of the amount of direct contracts. So for example a London based construction firm will require goods and services from its supply chain which will be spread across the UK. It will require aggregates from mining, equipment from manufacturing, engineering support from business services, etc. Firms can only find so much locally, and have to look to other regions (and further afield) to source their requirements.

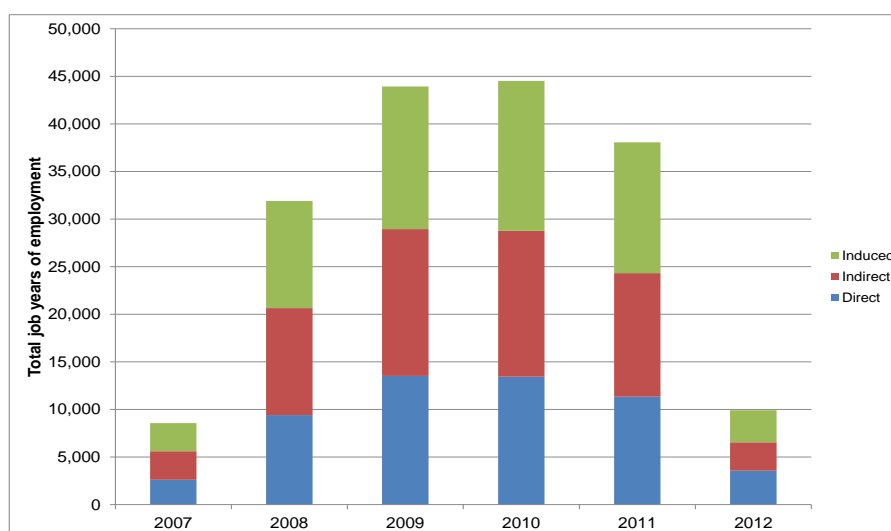
The estimates below are based on average sectoral and regional productivity assumptions. Actual productivity could be above or below these averages. The location of spend has been determined by postcodes in ODA's financial records. These postcodes however relate to the location of payment and not necessarily the location where the activity has taken place.

Oxford Economics and Grant Thornton are working with DCMS to gain a better understanding of the location of activity by the main contractors, and the location of their supply-chain.

### (ii) Emerging UK findings: Gross impacts

It is estimated that this spend could have resulted in £8.2 billion of GVA (£2008 prices) and approximately 177,000 job years of employment in the UK over the period. Figure 4-2 shows the breakdown of gross direct, indirect and induced job years of employment. Our estimates broadly follow the spending profile shown in Figure 4-1 above.

**Figure 4-2: UK employment estimates 2007 to Q1 2012**

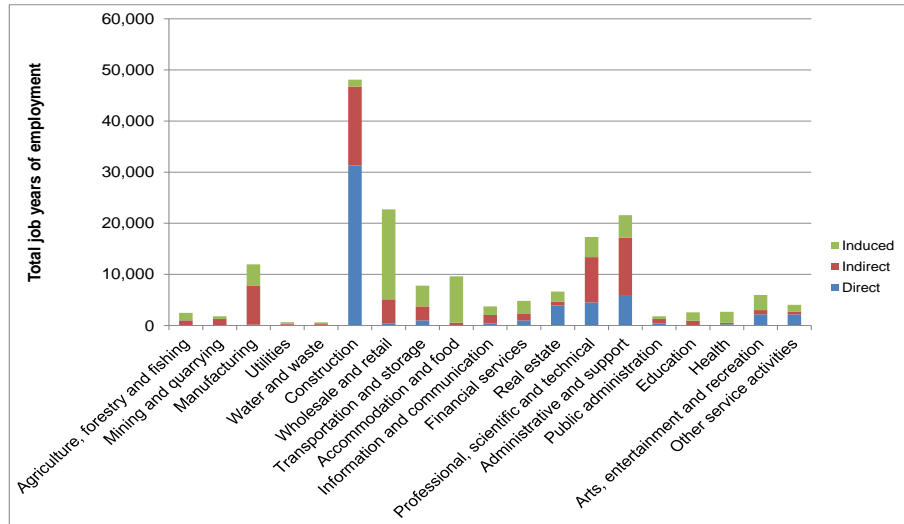


Source: Oxford Economics.

Note: Direct effects include the employment (and in the analysis below GVA and wages) of 'Tier 1' contractors. Indirect effects take account of the supply chain or spending by 'Tier 1' contractors, estimated using average patterns of expenditure by region and sector. Indirect effects cover all sectors of the economy and create jobs, wages and GVA. Induced effects build in the impact of the additional consumer spending generated by the wages of those directly and indirectly employed.

In terms of gross impacts by sector, construction enjoys the greatest benefits given the profile of spending over the period (Figure 4-3). Following on from this, the manufacturing sector enjoys considerable supply chain benefits. Induced benefits arising from consumer spending of those directly and indirectly employed are concentrated in sectors such as retail, and accommodation and food.

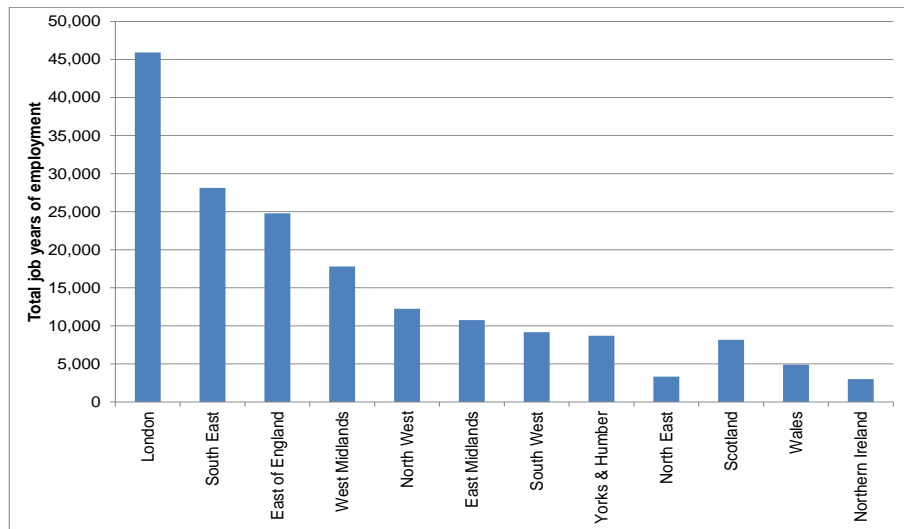
**Figure 4-3: UK sectoral employment estimates 2007 to Q1 2012**



Source: Oxford Economics.

At a regional level, London enjoys the greatest labour market benefits, with over 45,900 job years of employment. Neighbouring regions of South East and East of England also enjoy significant benefits. Northern Ireland (perhaps given its geographical location and relative size) has the least estimated jobs impact with only 3,000 job years of employment.

**Figure 4-4: UK regional employment estimates 2007 to Q1 2012**



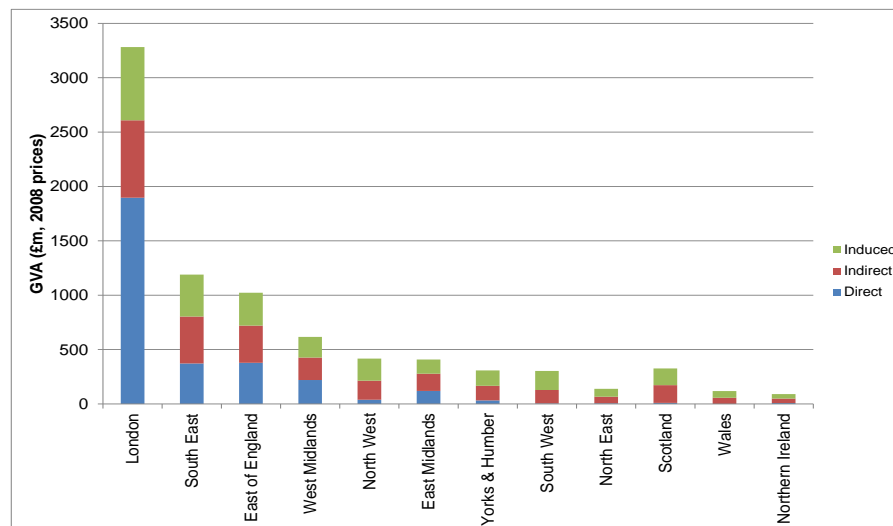
Source: Oxford Economics.

Figure 4-5 provides a summary of our estimates of gross impacts by region and by direct, indirect and induced gross impacts (Figure 4-6).

**Figure 4-5: Summary of regional gross impacts (2008 prices)<sup>55</sup>**

	Total Output (£m)	Total GVA (£m)	Total Job Years of Employment	Total Earnings (£m)
London	£5,990	£3,280	45,920	£1,370
South East	£2,570	£1,190	28,130	£650
East of England	£2,250	£1,020	24,770	£550
West Midlands	£1,360	£620	17,810	£340
North West	£900	£420	12,240	£230
East Midlands	£950	£410	10,760	£220
Yorkshire and the Humber	£690	£310	8,710	£170
Scotland	£660	£330	8,170	£170
South West	£640	£300	9,170	£160
North East	£280	£140	3,330	£60
Wales	£270	£120	4,900	£80
Northern Ireland	£210	£90	3,000	£50
Total	£16,770	£8,230	£176,910	£4,050

Source: Oxford Economics.

**Figure 4-6: Regional GVA impacts split by direct, indirect and induced**

Source: Oxford Economics.

<sup>55</sup> Output figures refer to the value of work done or the cost of providing goods and services. It differs from GVA in that it includes the costs of raw materials. GVA will therefore be lower than output. Job years is a measure of employment. Throughout the analysis employment impacts are given in terms of 'job years' in line with standard economic convention. Each 'job year' may be a permanent post, a temporary contract, or the full-time equivalent of several part-time roles. Also, it is not cumulative: so '100 job years for a 10-year period' means 100 full-time equivalent jobs sustained for 10 years, as opposed to 100 new permanent posts created each year. Total earnings refers to the associated wages of those employed.

**(iii) Emerging UK findings: net impacts**

The gross impacts above take no account of displacement. Yet in studies like this it is prudent to consider the likelihood of economic activity (created through ODA spend) displacing activity that otherwise would have happened.

In the absence of existing evidence on displacement Oxford Economics have developed a series of assumptions to apply to the analysis<sup>56</sup>. The assumptions have been made separately for each region, sector and year given the type of activity involved during the 6 year period and the relative performances of the UK's regional economies. Displacement is assumed to be quite low overall at between 0% and 70% depending on region and sector in 2007 and 0% and 30% depending on region and sector by 2012.

- In terms of differences across sectors, it has been assumed that high proportions of finance and business services jobs would have occurred regardless of the 2012 Games given their internationally tradable nature (therefore we applied displacement assumptions of 50% in London in 2007 falling to 15% by 2012). In addition, we also assumed that high proportions of public sector jobs would remain and be working on other projects in the absence of the 2012 Games. However we assumed that the construction sector would have had more spare capacity to accommodate the 2012 Games and applied displacement assumptions of 30% in London in 2007 falling to only 10% in 2012
- In terms of differences across years, the higher rates of displacement in 2007 are because the construction sector and wider economy was working at close to its capacity, with limited ability to take on large new projects at short notice. As a result, other potential construction projects could be displaced as there is not enough resource to carry them out alongside the Olympics. In 2012, the construction sector was experiencing falling output or slow growth and therefore had a greater than normal amount of spare capacity. Equivalent studies have justified zero displacement on this basis<sup>57</sup>.

Applying our displacement sector/region/annual assumptions provides an overall level of displacement of 12%. In other words, our net UK GDP impacts are 88% of the level of the gross impacts above. The net GVA impact is estimated at £7.3 billion (£2008 prices) compared to the £8.2 billion gross impact. In addition, we find that the number of job years falls by just over 10% to 158,620.

At a regional level London's net impacts fall to approximately 85% of their gross level. Figure 4-7 below presents a summary of the regional net impacts for output, GVA, employment and wages.

<sup>56</sup> It is expected that a clearer understanding of the scale of displacement to become available later in the year when we undertake the economic impact analysis on not only the build-up, but the hosting and legacy of the Games.

<sup>57</sup> Oxford Economics (2012). What is the economic impact of London 2012, Lloyds Banking Group.

**Figure 4-7: Summary of regional net impacts (2008 prices)<sup>58</sup>**

	Total Output (£m)	Total GVA (£m)	Total Job Years of Employment	Total Earnings (£m)
London	5,120	2,800	39,500	1,170
South East	2,270	1,050	24,990	580
East of England	2,100	950	23,250	520
West Midlands	1,270	580	16,610	320
North West	820	380	11,040	210
East Midlands	870	370	9,810	200
Yorkshire and the Humber	620	280	7,820	150
Scotland	590	290	7,310	150
South West	570	270	8,200	140
North East	250	120	2,990	60
Wales	240	110	4,390	70
Northern Ireland	190	80	2,710	50
UK	14,910	7,280	158,620	3,620

Source: Oxford Economics.

#### (iv) Modelling enhancements for Report 5

It is intended that a short survey of key contractors will be undertaken to enhance understanding of the location of activity and the location of sub-contractors (ie Tier 2s and others). The results of the survey will have implications for our employment estimates (national and regional) given that productivity differs from region to region. It is likely that the greatest impact will be on host borough and Rest of London estimates

The next phase of economic modelling (for Report 5) will include:

- The cost of staging the Games;
- The cost of and post-Games transformation;
- Any remaining preparation costs not included in the ODA spend
- Other economic impacts such as tourism, inward investment, skills, Olympic Park transformation and wider East London regeneration.

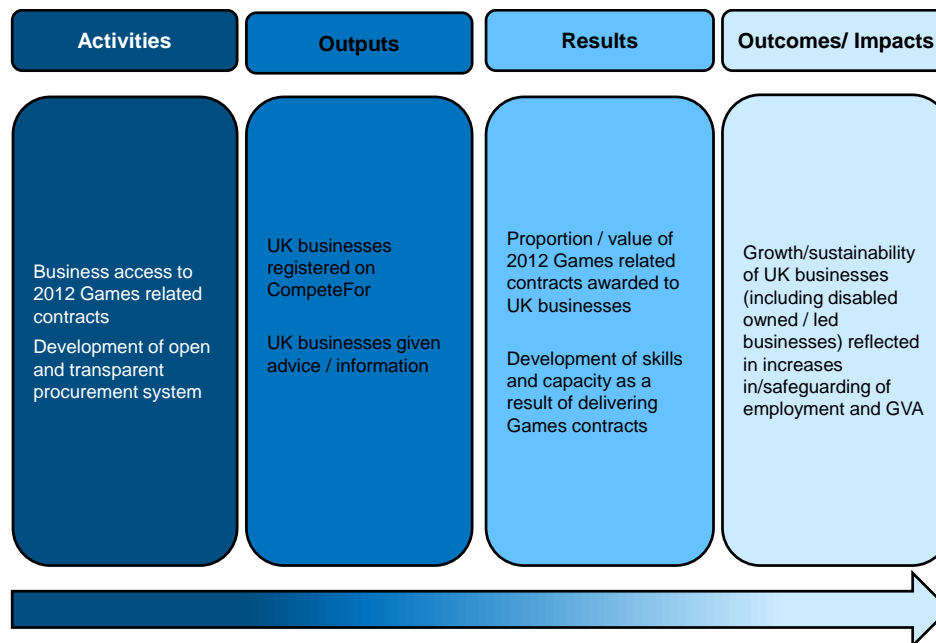
<sup>58</sup> Output figures refer to the value of work done or the cost of providing goods and services. It differs from GVA in that it includes the costs of raw materials. GVA will therefore be lower than output. Job years is a measure of employment. Throughout the analysis employment impacts are given in terms of 'job years' in line with standard economic convention. Each 'job year' may be a permanent post, a temporary contract, or the full-time equivalent of several part-time roles. Also, it is not cumulative: so '100 job years for a 10-year period' means 100 full-time equivalent jobs sustained for 10 years, as opposed to 100 new permanent posts created each year. Total earnings refers to the associated wages of those employed.

### 4.3 Business access to 2012

This sub-theme is concerned with interventions aimed at promoting Games-related opportunities for UK businesses. There is a particular focus on addressing the barriers that businesses may have faced in accessing information on and bidding for Games contracts. It is also concerned with the legacy effect of improvements in business competitiveness which result from the delivery of Games contracts.

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for the business access to 2012 sub-theme. It should be noted that while there is evidence of a number of outputs and outcome achievements there is less evidence currently available on progress made in delivering the specified longer-term outcomes/impacts in terms of business competitiveness.

**Figure 4-8: Business access to 2012 summary logic model**



#### (i) Legacy programmes and initiatives

This sub-theme primarily focuses on the effectiveness and impacts of the CompeteFor programme, a key public sector initiative, aiming to address barriers facing small and medium-sized enterprises (SMEs) in accessing contract opportunities connected to the Games.

The CompeteFor intervention consists of three interdependent delivery mechanisms:<sup>59</sup>

- **Electronic Brokerage System (EBS):** This web based solution was developed to ensure UK businesses have access to, and can compete for, 2012 Games related business opportunities. It is a match-making service for buyers and suppliers for all Games related opportunities ranging from construction, engineering and manufacturing to creative merchandising;
- **Supplier engagement programme:** Each UK region is responsible for delivering and funding local-level supplier engagement activities which can include: presentations, events, business seminars, regular email communications etc. Suppliers are signposted to business support services (through the national BusinessLink.gov.uk website or equivalent in Scotland, Wales and Northern Ireland) helping them to build their capacity to compete for public and private contracts;
- **Buyer Engagement Team (BET):** The BET is focused on optimising the number of opportunities posted on the EBS by buying organisations within the supply chain. The core

<sup>59</sup> Evaluation Partnership (2011). BIS and RDAs: Interim Evaluation of CompeteFor.

activities of BET involve meeting prospective buyers to train, support and encourage them to post contracts on CompeteFor.

CompeteFor is only one method used by the London 2012 authorities (ie the ODA and LOCOG) and their supply chains when buying goods, works and services. Other 'routes to market' included existing framework agreements, use of single source suppliers for low value procurement and sponsorship.

CompeteFor was designed to ensure that all businesses have equal opportunity to access Games related contracts regardless of where they are based in the UK. The potential legacy benefits can also be seen in terms of the longer-term impacts business growth as a result of registering on the CompeteFor system and bidding for contracts.

The rationale for the programme in legacy terms is articulated clearly in the CompeteFor Interim Phase Evaluation, as follows:

- Information failures in terms of SMEs being locked out of bidding for 2012 Games contracts due to a lack of transparency in procurement processes further down the 2012 Games supply chain (information market failure);
- SMEs could lack the capacity and capabilities to get shortlisted for 2012 Games contracts due to insufficient internal processes and procedures around Health and Safety environmental policies etc;
- Policy level considerations were given to using the Olympics as a hook to encourage SMEs to seek business support to improve their capacity and as a result generate a greater legacy from the Games;
- Without the intervention private sector firms delivering 2012 Games contracts could lose the opportunity to secure business benefits and other efficiency savings by not being aware of potential benefits to supply chain diversification (coordination market failure).

It is argued in the evaluation that the success of CompeteFor in enabling UK businesses to compete for and secure 2012 Games supply contracts (and hence its achievements in supporting a geographical spread of SME access) needs to be considered within the constraints of the market system including SME internal capabilities and processes and pressures on buyers to deliver high profile contracts in tight timeframes.

#### **Box 4-2: The Yorkshire Gold Business Club**

The Yorkshire Gold Business Club (YGBC) carried out a programme of business engagement resulting in more than 50 events generating a total attendance of some 2,500 delegates.

The aim of the events programme (run in parallel with a series of LOCOG dignitary visits) was to inform, inspire and educate the region's businesses of the London 2012 business opportunities. This was achieved via high profile events and workshops.

Key events that featured senior ODA and LOCOG personnel included 'Ahead of the Games' with keynote speaker Lord Coe, 'The Business of Winning' with Paul Deighton and 'Ready, Set, Compete' with John Armit.

YGBC also launched a successful programme of CompeteFor workshops that were rolled out throughout the region. These were small interactive events based in IT classrooms that were designed to ensure delegates were provided with the help they needed to fully publish their profile and start competing for London 2012 contracts. CompeteFor registrations increased as a result.

Partnering with other support organisations was central to YGBC's strategy and they had successful collaborative events with UKTI and Business Link.

*Source: Yorkshire and Humber End of Games Report September 2012*

**(ii) Evidence available: Outputs & expenditure**

CompeteFor is a multi-stakeholder funded intervention which has been supported by significant financial contributions from each of the former Regional Development Agencies<sup>60</sup> and relatively smaller, but still significant contributions from each of the Devolved Administrations.<sup>61</sup> As detailed in the table below, the total expenditure budgeted for core delivery of the CompeteFor intervention (both EBS and BET) between 2007/08 and 2012/13 was just under £14 million. The Interim Phase Evaluation records that actual expenditure up to the end of 2009/10 was £9.6 million.

**Figure 4-9: Public expenditure on UK business access**

Legacy programme/initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
CompeteFor	UK Government	£13.8 (2007/08 to 2012/13)	£9.6 (to 2009/10)	2007/08 – 2012/13

Analysis in Report 3 indicated that it is very unlikely that an e-procurement initiative of the scale and ambition of CompeteFor would have gone ahead without the Games. Key stakeholders interviewed for the meta-evaluation believe that insufficient resources would have been made available to support a programme of this scale if the Games had not been awarded to London. A key driver of CompeteFor was the need to ensure that the procurement process for Games contracts would be as accessible as possible to businesses of all sizes throughout the UK. It is therefore reasonable to assume that the programme is wholly additional and therefore that all of the net impacts and legacy benefits of the programme can be attributed to the Games.

Data on the gross outputs for this sub-theme relate to the CompeteFor programme, as shown below.

**Figure 4-10: UK business access outputs achieved**

Legacy programme/initiative	Lead Organisation	Total Outputs/KPI achieved	Units	Time period
CompeteFor	UK Government	Total number of registered businesses	140,300	2007/08 – 2010/11
		Number of short-listings for opportunities	50,300	2007/08 – 2010/11
		Number of business opportunities made available	8,300	2007/08 – 2010/11

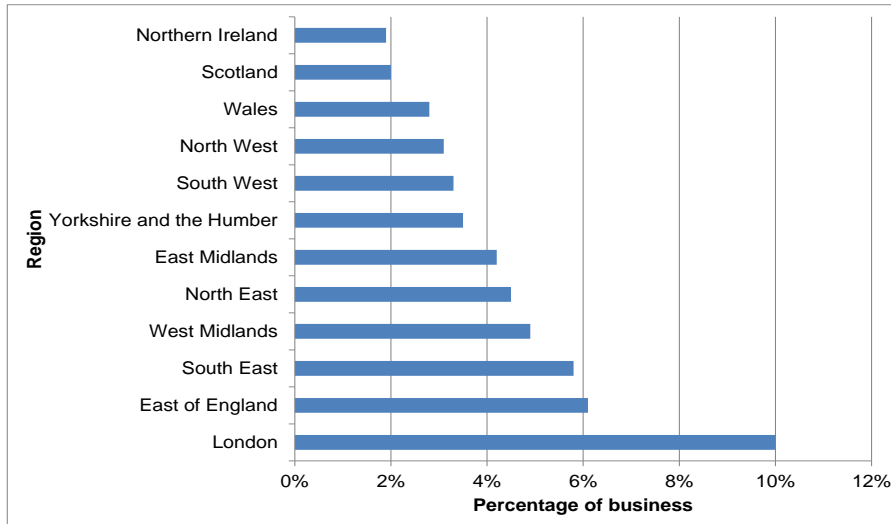
As shown in the chart below, at the time of the interim evaluation CompeteFor's penetration of the business community on the supply side was highest in London with 10% of all businesses in the region registering for CompeteFor and 4.4% getting shortlisted for at least one contract opportunity. The second most represented region was the East of England with circa 6% of all businesses in the region registering and 2.5% getting shortlisted for a contract. This suggests that the programme was encouraging a reasonably good geographical spread of registered businesses but with some scope to achieve a better penetration into the northern regions of England and other parts of the UK.

<sup>60</sup> The RDAs ceased to exist on April 1<sup>st</sup> 2012.

<sup>61</sup> Evaluation Partnership (2011). BIS and RDAs: Interim Evaluation of CompeteFor.



**Figure 4-11: Registration for CompeteFor by region**



Source: Interim Phase Evaluation of CompeteFor.

Drawing on data from the evaluation report, the graph below shows that after business had been registered there had been a reasonably good spread of contract awards across the regions and nations. The highest proportion has been in the West Midlands where the number of contracts awarded, when compared to the number of businesses registered is 2.5% of registered businesses. Wales and London are next at around 1.2%.

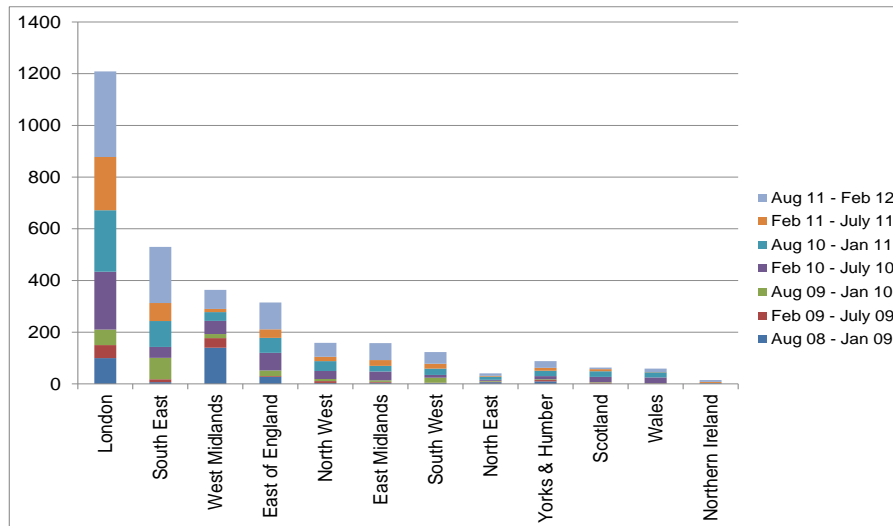
**Figure 4-12: Proportion of contracts awarded versus registration by UK Region**



Source: Interim Evaluation of CompeteFor.

Recent data on the regional breakdown of contracts awarded through CompeteFor shows that around 1,200 contracts have been awarded to companies based in London. The next highest number was to companies in the South East region (530) followed by the West Midlands (364). In the case of the West Midlands this reflects the region's relatively high conversion rate as highlighted above.

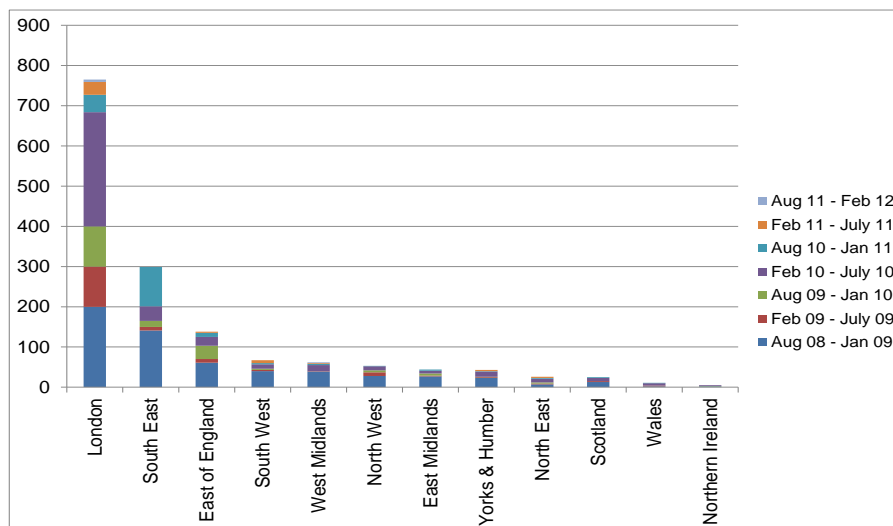
**Figure 4-13: CompeteFor contract awards by region**



Source: CompeteFor Contract Management Team (TfL).

Nevertheless the graph below suggests that the CompeteFor system had limited influence on the regional distribution of ODA contracts with 54% of all ODA contracts awarded to companies in London and a significant proportion to companies based in the South East.

**Figure 4-14: ODA contract awards by region**



Source: ODA.

**(iii) Evidence available: Evaluation and research**

As noted, the key source of evidence under the sub-theme of business access to 2012 is the Interim Phase report of the National Impact Evaluation of CompeteFor.<sup>62</sup> This is the second in a series of three reports on the impacts of the programme. As noted, the Interim Phase Evaluation provides an interim account of progress to date. The Final Phase Evaluation report is planned to be completed in early 2013.

The CompeteFor Interim Phase Evaluation provides a detailed and robust assessment of the programme's progress to date. Two sources of primary research provide the evidence base for the evaluation:

- Supplier side evaluation research: The evidence gathering approach for the interim evaluation included a nationally representative supplier telephone survey with 2,236 firms

<sup>62</sup> The Evaluation Partnership Ltd (2011). BIS and RDAs: Interim Phase National Impact Evaluation of CompeteFor.

who were registered on CompeteFor (achieving a margin of error of +/-2%); 15 in-depth interviews with suppliers, and a programme of stakeholder consultations (20);

- Buyer side evaluation research: The BET evaluation methodology included: 212 semi-structured interviews with firms in the 2012 Games supply chain (97 CompeteFor buyer users and 115 non-CompeteFor buyers).

At the time of the CompeteFor Interim Phase Evaluation circumstances outside of the direct control of BET were constraining the delivery of this element of the programme: BET did not have the opportunity to penetrate the first tier of the Games supply chains in many cases and the high pressure nature of Games contracts was evidenced as discouraging potential buyers. At this time the BET component had not been as successful as was hoped in encouraging a sufficient number of contract opportunity posts onto the system.

However the evaluation acknowledges that BET was not in place early enough to penetrate the supply chains of many Tier 1 contractors and the contractual flow-down clause<sup>63</sup> was not reinforced at this early stage by the ODA. Additional consultations for the meta-evaluation have indicated that engagement has improved with the proportion of Games contracts being procured through the CompeteFor system increasing over time.

CompeteFor aims to provide a fair and transparent platform for firms of all sizes and geographic locations to compete for contracts. The interim evaluation showed that CompeteFor had assisted with raising awareness of contract opportunities for micro-enterprises and small businesses employing less than 50 employees. It noted that further progress was needed, however, in making the process of bidding for contracts easier. To understand the extent to which CompeteFor has been successful in doing this the interim evaluation reviewed the likelihood of firms with different characteristics getting shortlisted for contracts. The evaluation concludes that there are some basic firm characteristics which increase the likelihood of being shortlisted which are outside the control of CompeteFor's remit. Probit models were used to determine the relative importance of these factors. The findings were:

- Micro-enterprise (less than 5 employees) are significantly less likely to have been shortlisted for a contract and indeed it is firms employing between 50 and 250 employees that are more likely to have been short-listed;
- Firms employing between 5 and 10 employees are no less likely in the last year to have been short-listed;
- More established businesses (trading for more than 5 years of age) are significantly more likely to have been short-listed for contracts;
- Firms located in London are significantly more likely than anywhere else in the UK to have been short-listed for contracts;
- Firms located in Scotland, Wales and Northern Ireland were no less likely than firms in the rest of the UK (except London) to have been short-listed (this was noted as an improvement in the position a year earlier when they were significantly less likely.)

In respect of the BET component of the programme, key findings were as follows:

- Limited buyer benefits: 39% of buyers cited benefits from their use of CompeteFor;
- Some long-term benefits: one-fifth of buyers stated that their interaction with BET/CompeteFor changes the procurement culture within their firm to some extent;
- Also evidence to suggest that given the high profile and time restricted nature of 2012 Games procurement, it limited firms' willingness to diversify their 'tried and trusted' supply chain;

<sup>63</sup> This is the contractual requirement to advertise sub-contracts through CompeteFor.

- It was highlighted that there are a wide range of external factors influencing the procurement behaviour of firms, and as a result BET will only ever be able to have limited influence working in isolation.

As noted, the interim evaluation has not considered the supplier engagement component of CompeteFor which has been delivered at the regional level. However, some illustrative evidence on the impact of regional approaches has been gathered from review of regional publications (see Box 4-3 below).

#### Longer-term Impacts on Businesses

Recent research for DCMS<sup>64</sup> has examined the impacts of the Games on construction firms who worked on Games contracts. Although confined to construction businesses and work completed for the ODA, the research shows some positive results in relation to the potential role of the Games in supporting the longer-term competitiveness of UK businesses. The key findings of the research which were based on a survey of 276 companies are as follows:

- 68% of companies said working on the 2012 Games has enhanced their reputation, rising to 77% for larger companies;
- Almost a third of companies have already secured further work as a result of their experience with the 2012 Games;
- Almost three-quarters of companies anticipated future business opportunities as a result of their involvement in the Games.

The report also provides some qualitative evidence on the impacts of working on Games contracts with one quote in particular illustrating how Games contracts have impacted on businesses beyond London and the South East:

*"Following the successful completion of the project, we are now seen as a national company and not just a Northern-based company. This has enhanced our reputation and will give us future opportunities to secure work on this basis. The project could not have come at a more critical time in the cycle of the recession."*

Other views which reflect the potential longer-term impacts of the Games are reported as follows:

- Opportunity to capitalise on legacy and 'stretch the moment' – especially as no other city has nailed the legacy;
- Exclusive club or network supplying the Games: Olympic Business Card;
- Good reputation of the 2012 Games 'rubs off' on suppliers, which equals more work won.

#### **Box 4-3: Supplier engagement in the South East**

In partnership with Local Authorities, Business Link in the South East has delivered a programme of support for small businesses to help them make the most of the opportunities available through the London 2012 Games. The programme has helped businesses to: review existing policies, create new policies, look at new markets, take environmental and sustainability issues more seriously, consider business continuity, create new business plans and look at public sector procurement in the UK, Europe and Internationally - alone or in consortia.

The programme has delivered the following outputs:

- Over 90 core workshops to almost 9,000 small businesses
- Over 23,000 business registrations on the Compete For website
- Almost 1,000 contracts won by South East businesses, valued in excess of £850 million.

*Source: Triple Gold: The London 2012 Games in the South East.*

<sup>64</sup> Sir John Armit report, London 2012 – a global showcase for UK Plc.

### Sustainability of CompeteFor

The sustainability of CompeteFor is recognised as a potentially important legacy benefit of the Games. Sufficient funding has been received from the former Regional Development Agencies and the devolved administrations of Scotland, Wales and Northern Ireland to ensure CompeteFor continues until September 2012. Following the closure of the Regional Development Agencies in England, including the London Development Agency (LDA), the CompeteFor project continues to be managed by the existing CompeteFor Contract Management Team, who are now based within the Commercial Centre of Excellence at Transport for London (TfL) which is part of the Greater London Authority (GLA) group.

It is worth noting that since the service began in 2008, other major buying organisations and their supply chains are using CompeteFor as part of their procurement process, including TfL and Crossrail (currently the largest civil engineering construction project in Europe) – meaning that business opportunities are being made available to potential suppliers beyond the Games. Such a legacy effect may help to support the sustainability of the programme.

The Interim Phase evaluation indicates that opportunities for funding and sponsorship to ensure the continuation of the service are being researched by the CompeteFor Contract Management Team and Strategic Board. Updated information from TfL provided for this report indicates that at the time the CompeteFor project was transferred to TfL there was an aspiration from the key stakeholders to continue the service beyond the 2012 Games and it was believed that CompeteFor's assets could be exploited by a private sector partner to generate revenue for a self-sustaining business model.

The Mayor of London stated in his 2012 Mayoral election manifesto that he would strengthen CompeteFor. The Mayor has made short-term additional project funding available, meaning that the service can continue under the current delivery, whilst TfL are working to successfully procure a suitable self-sustaining private sector-led business model that would ensure CompeteFor could continue beyond 2012, without being wholly reliant on public sector funding.

It is expected the private sector partner would deliver the service under a concessionary contract through a model that is commercially sustainable.

TfL is open to considering a variety of different business models for the sustainability of the service and to-date, there has been a promising level of interest from companies in different sectors following a 'market sounding exercise' (issued via CompeteFor itself and OJEU) which took place in April 2012. The business models being discussed with TfL are varied and include innovative ideas for adding value to the CompeteFor experience for users.

Following a comprehensive procurement process, it is expected that CompeteFor's new commercial business model would be operational from early 2013.

#### **(iv) Conclusions: Outcomes and additionality**

CompeteFor firms citing a turnover benefit as a direct result of the programme and not counted as displacing the turnover of other UK based firms were included in the calculation of the GVA impact of. As the evaluation notes, gross turnover and employment impacts from CompeteFor are heavily offset by displacement effects given that the central remit of CompeteFor is not to generate income for businesses per se, but to distribute more evenly the income generated through the staging of the Games. Only two firms responding to the survey had turnover benefits which did not displace the turnover of other UK based firms. Given the high turnover generated by these two firms, when aggregated, the overall impact of CompeteFor (based on circa 130,000 registrants) appears to be relatively high. The total GVA generated from the EBS intervention at the interim stage is estimated at £99 million.

On the buyer side, there was evidence of time and cost savings for those buyers which used CompeteFor to post high volumes of core business opportunities although a monetary value was not calculated.

**(v) Progress in answering the research questions**

*To what extent and in what ways have support interventions enabled UK businesses (across a range of sectors and including small and medium-sized enterprises and minority-owned businesses) to compete for and secure London 2012 supply contracts?*

Monitoring data shows that CompeteFor has achieved a reasonably good geographical spread both in terms of the regional distribution of business registrations but also the percentage of registered business winning contracts. The evaluation showed that CompeteFor had assisted with raising awareness of contract opportunities particularly for micro-enterprises and small businesses employing less than 50 employees. It noted that further progress was needed, however, in making the process of bidding for contracts easier although how far this could be addressed within the scope of the programme was not explored further in the interim evaluation. As highlighted in the evaluation, the programme's impact on ease of access to contracts needs to be considered within the current market climate and more deep-rooted barriers facing SMEs in accessing contract opportunities, not all of which can be addressed through a programme of this kind.

The CompeteFor programme is planned to run from 2008 to 2012 therefore the interim evaluation findings do not provide a final assessment of the effectiveness and impact of the CompeteFor intervention but an interim view on progress to date. A more definitive account of the effectiveness and impacts of the programme will be provided in the final evaluation which is due to be completed in early 2013

*How has the delivery of 2012 Games-related contracts impacted on the long-term productivity and competitiveness of UK companies?*

Evidence on the impact of the Games on UK companies has been gathered in research for DCMS. Although confined to construction businesses and work completed for the ODA, the research shows some positive results on how Games contracts may contribute to the long-term competitiveness of UK businesses. Comprehensive analysis of how the delivery of 2012 Games-related contracts has impacted on the long-term capacity of UK businesses has not been undertaken within the timeframe of this report. However it has been confirmed that long-term impacts will also be examined in the Final Phase evaluation of CompeteFor. The meta-evaluation team will contribute to the design of questions targeted at companies that have delivered Games contracts.

*What extent have the 2012 Games been used as a vehicle to increase standards and access to business opportunities amongst disabled people?*

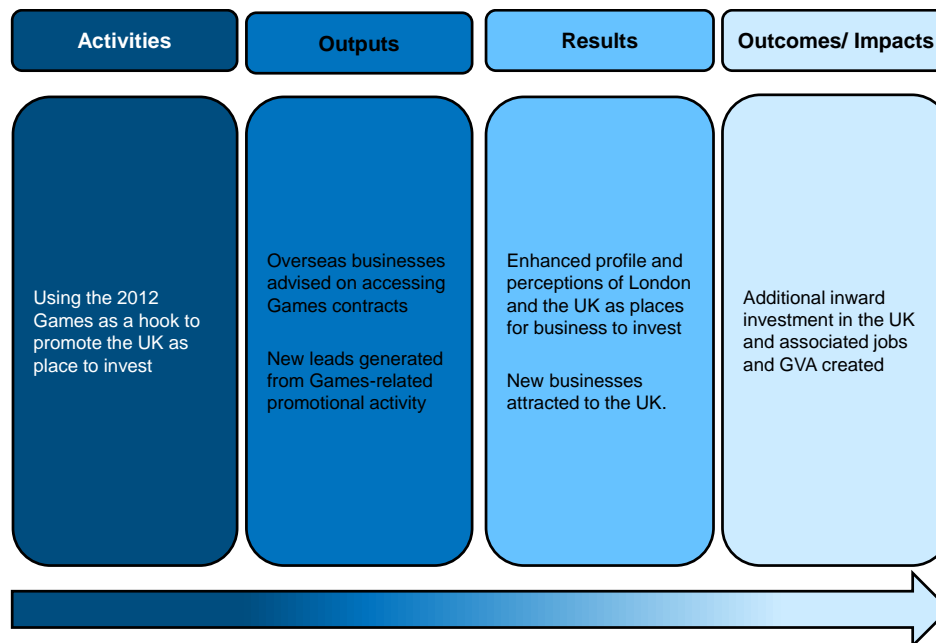
The CompeteFor Interim Phase evaluation does not provide any evidence to answer this question. However, it is understood that the survey for the Final Phase evaluation will provide an in-depth examination of the impact of the programme on diverse-owned businesses, including those owned and/or led by disabled people.

#### 4.4 Promoting the UK as a place to invest

There is an expectation that the Games will provide additional exposure for London and help to influence business perceptions of the benefits of locating in the UK. The 2012 Games and the connections it provides, not only with other host cities but also through the presence of business leaders in London during the Games, means that there is an important opportunity to use the Games as a hook to promote the benefits of London and the UK as attractive investment locations.

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for the inward investment sub-theme. It should be noted that while there is evidence of a number of outputs and outcome achievements there is less evidence currently available around the progress made in delivering the specified results, outcomes and impacts.

**Figure 4-15: Promoting the UK as a place to invest summary logic model**



##### (i) Legacy programmes and initiatives

A number of key programmes and initiatives are aiming to use the Games as a hook to promote inward investment. These include:

- **British Business Embassy:** During the Olympics and Paralympics, the Prime Minister, Deputy Prime Minister, Chancellor, Business Secretary, Foreign Secretary and over 30 other ministers hosted business leaders and global figures and international buyers, investors and policy makers, to a series of global business summits. The programme included country days devoted to China and Brazil and Sector Summits featuring UK expertise in the creative industries, education, healthcare and life sciences, ICT, energy, infrastructure, retail, food and drink, advanced engineering, assistive medical technologies and global sports projects, plus a collaboration with the International Paralympic Committee. Each summit featured a business breakfast, interactive thought leadership sessions, networking opportunities and an evening reception;
- **The Global Investment Conference:** The flagship event for the British Business Embassy which "*showcased the UK as an outstanding global investment destination and that the UK was open for business*". The conference took place in London on the day before the Opening Ceremony;
- **Targeting potential investors through delivery of Games contracts:** The CompeteFor service, with which foreign companies can register, is providing an additional opportunity for UK Trade and Investment (UKTI) and other agencies to target potential overseas investors, and convert foreign interest in 2012 contracts into wider investment potential;

- London and Partners 2012 Programme: The London and Partners 2012 Objective is "to use the 2012 Games as a business catalyst" to deliver incremental foreign direct investment to support 5000 jobs (equivalent to around £500 million in GVA) in 2006 – 2016;
- Tech City Investment Organisation: supporting the tech and creative sectors cluster in East London, stretching from Shoreditch to the Olympic Park. This could significantly increase the inward investment potential for the area, as well as being a means by which investors will be attracted to other parts of the UK;
- GREAT campaign: launched in September 2011, the campaign is designed to use the platform of the Games in 2012 to showcase Britain's capabilities in a number of areas. The campaign includes overseas marketing of the UK as a tourist destination (as described in Section 4.6) and as an investment destination.

### (ii) Evidence available: Outputs & expenditure

Evidence collected to date on expenditure under this sub-theme is shown in the table below.

**Figure 4-16: Public expenditure on promoting the UK as a place to invest**

Legacy programme/ initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
British Business Embassy	UKTI	£4.9m plus £1m private sector cash sponsorship	Not available at this time	July – August 2012
Global Investment Conference	UKTI	Included within the British Business Embassy budget	Not available at this time	July 2012
Using CompeteFor registration to target foreign companies	UKTI	£0 (ie there is no additional programme budget for this activity)	Not available at this time	2007 /08 – 2010/11
London and Partners 2012 Investment Programme	London and Partners	Not available at this time	Not available at this time	Not available at this time

Analysis of the policy counterfactual was undertaken for Report 3 focusing on UK Trade and Investment's (UKTI's) key interventions around Games time, in particular the British Business Embassy and Global Investment Conference. Consultations with UKTI project managers indicated that a programme of events of this scale and intensity would not have gone ahead without the Games (although funding for these initiatives may have been diverted away from a more disparate set of activities).

**Figure 4-17: Promoting the UK as a place to invest outputs achieved**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Units	Time period
British Business Embassy	UKTI	Not available at this time	Not available at this time	July – August 2012
Global Investment Conference	UKTI	Not available at this time	Not available at this time	July 2012
CompeteFor	UKTI	Assessed	2,614 companies	2007 /08 – 2010/11
		Interactions	1,050 companies	
		Investments	520 projects	
London and Partners 2012 Investment Programme	London and Partners	Investment projects	114 projects	2009/10 -



For the British Business Embassy, UKTI hosted business leaders and global figures (including over half of the FTSE 100 companies) and international buyers, investors and policy makers. In total over 4,700 delegates attended across 18 days of trade and investment conferences including country days devoted to China and Brazil and Sector Summits highlighting areas of UK expertise. The Global Investment Conference, which was the flagship event of the British Business Embassy on the day before the Opening Ceremony, attracted around 200 global CEOs (two thirds of the international delegates) from 29 countries.

UKTI monitoring data indicates that 520 international companies that bid through CompeteFor for 2012 contracts (as of May 2012) have been advised by UKTI on inward investment opportunities in the UK. It is understood that future evaluation work will examine how far the CompeteFor service and the follow up work by UKTI advisors have helped to secure new inward investment projects.

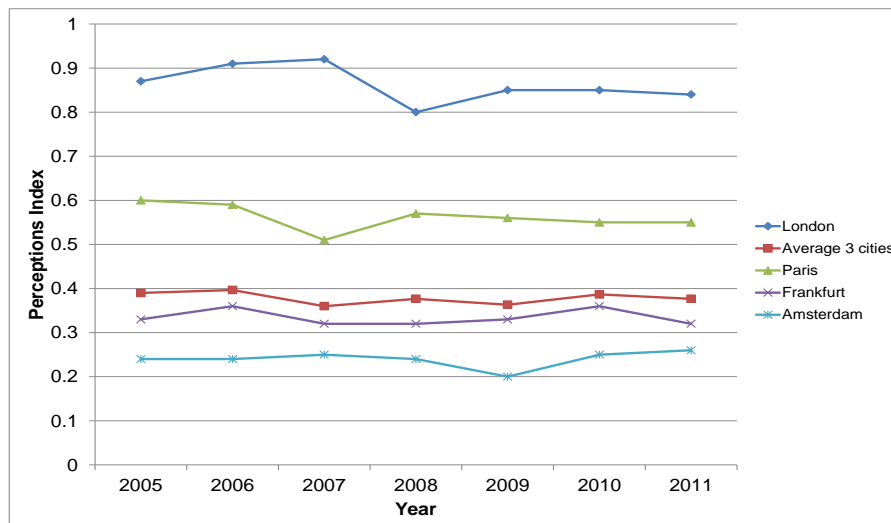
London and Partners has provided an analysis of investment projects in which the Games could be considered to have had a 'catalytic' impact on the decision to locate in London. Or, that the Games was/is a factor that encouraged further growth of an existing start-up. In order to be counted as an investment completion the project has to comply with at least 3 criteria from a list which reflects the London and Partners' Games-related activity. Since 2009, there have been 114 projects which fulfilled three or more of the criteria. According to London and Partners' monitoring data, these generated 3,900 gross jobs in the first year of the investment project coming on stream.

### **(iii) Evidence available: Evaluation and research**

Evaluation evidence on the Games' impacts on inward investment is not available at this time. Wider survey evidence provides some insight into the potential for impact. The 2011 CBI London Business Survey which received over 250 responses from a cross-section of London businesses suggests that business leaders are generally positive about the potential impacts of the Games on promoting the UK as a place to invest. Ninety-two per cent of respondents believed that the Games will help promote London internationally. This was also seen as being the most important way in which the Games can impact on the economy in the longer-term.

Analysis of perceptions of London as a place to invest with respect to suitable comparators may provide an indication of whether there has been any Games effect in this area. A way to explain the possible impact of the Games on perceptions is to start from the changes observed over time. This difference alone cannot be interpreted as an impact of the Games, because there are many other factors and processes unfolding over time, besides the Games, that might have caused the observed change. One way to attempt to isolate the impact of the Games is to compare the change over time with comparator cities during the same period. Subtracting the change observed over time among comparator cities from that observed in relation to London could provide an indication of the impact of the Games on perceptions.

Cushman & Wakefield's annual survey on Europe's major business cities has provided an overview of the perceptions that corporations have about cities across Europe and their relative attractiveness, and how perceptions have changed over that time. The survey targets senior executives from European companies on their perceptions of Europe's leading business cities. The number of responses to the 2011 survey was 501. The scores for each city are based on the responses and weighted according to nominations for the best, second best and third best. Each score provides a comparison with other cities' scores and over time for the same city.

**Figure 4-18: Perceptions of European cities as business locations**

Source: Cushman and Wakefield European Cities Monitor 2005-2011.

London has consistently achieved the highest score as a location to do business. Since 2008 the difference between London and the average score for three comparable cities (Paris, Amsterdam and Frankfurt) has widened slightly - London's score increased from 80 to 84 while the average score for the 3 other cities remained constant at 38. This cannot be regarded as a statistically significant difference so cannot be attributed to any Games effect. However, the Cushman and Wakefield survey also shows that the percentage of business leaders believing that London was doing the most to promote itself increased significantly from 16% in 2010 to 25% in 2011. There have been heightened efforts to promote London in the build up to the Games but as yet, the evidence cannot provide causality of the changing perceptions described above.

#### (iv) Conclusions: Outcomes and additionality

There is no evidence available yet on the outcomes and additionality as the key interventions occurred around Games time.

#### (v) Progress in answering the research questions

*To what extent have the Games encouraged foreign-owned businesses to invest in the UK (and create associated GVA and employment) through influencing their perceptions of the UK as a place to invest, either through specific programmes or through the exposure the Games has provided?*

There is very limited evidence to date which is relevant to answering how far the Games has influenced inward investment patterns in the UK. It is anticipated that many of the impacts will be seen in the post-Games period through the exposure the Games provided and the specific promotional events which were planned to take place during the Games. However, comparing international perceptions of London with other comparable European cities suggests that London has been performing well in terms of perceptions in the period leading up to the Games. It is possible that this trend has some connection with Games-related inward investment initiatives though the evidence is not conclusive. However, monitoring data from London and Partners, the inward investment promotion agency for London, indicates that 114 recent investment projects in London have a strong link to Games-related promotional activity.

*To what extent have 2012 Games-related contracts helped to generate foreign direct investment (and associated GVA and employment) by encouraging foreign-owned companies to move their operations to and maintain their presence in the UK?*

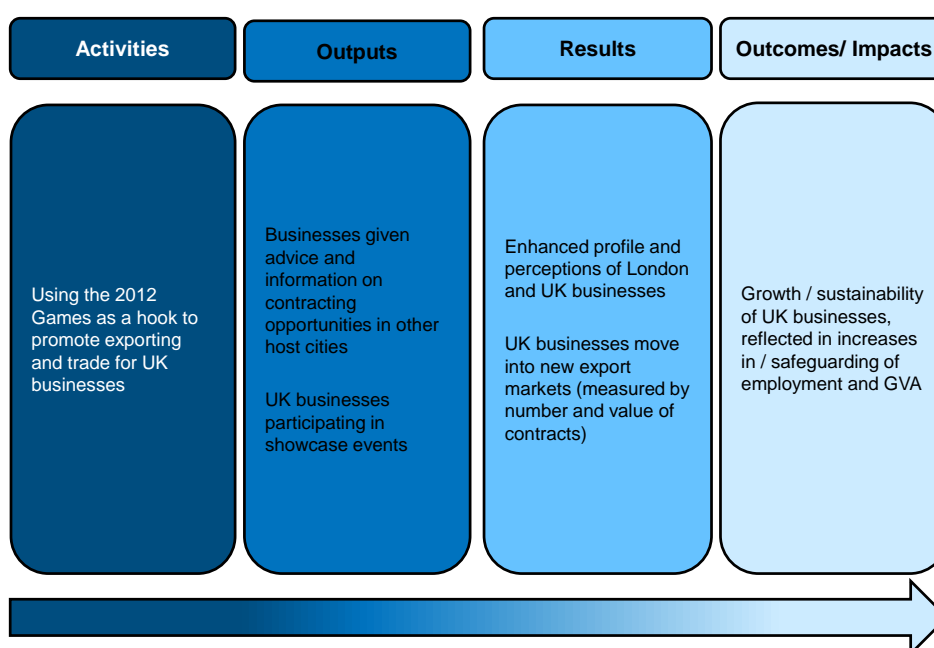
UKTI monitoring data indicates that 520 international companies that bid through CompeteFor for 2012 contracts (as of May 2012) have been advised by UKTI on inward investment opportunities in the UK. It is understood that future evaluation work will examine how far the CompeteFor service and the follow up work by UKTI advisors have helped to secure new inward investment projects.

## 4.5 Export and trade promotion

The rationale for the export and trade promotion focus in the legacy of the 2012 Games is the expectation that the international spotlight on the UK as a result of the Games will open up new export markets to UK companies. The legacy strategy anticipates that the build up to the Games, and particularly the Games period itself, will have given UK businesses the opportunity to showcase and promote UK innovation, enterprise and creativity, with opportunities to access new export markets and international contracts. There is also potential for businesses to build on their successes in delivering Games contracts by exploiting innovation and their enhanced reputations in international markets.

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for the export and trade promotion sub-theme. It should be noted that there is limited evidence to date of outputs and outcome achievements and in relation to progress made in delivering the specified results/outcomes/impacts.

**Figure 4-19: Export and trade promotion summary logic model**



### (i) Legacy programmes and initiatives

The following initiatives aim to use the Games as a hook to promote exporting, as detailed below.

- **British Business Embassy:** The British Business Embassy, which involved a series of global business summits during the Games, promoted UK exports as well as promoting the UK as a place to invest. The activities and outputs are covered in section 4.4. above.
- **British Business Club:** launched in September 2011, this will provide a one-stop-shop where up-to-date details of networking events, future business opportunities and potential partners will be posted. The content will cover not only information related to business activity around the 2012 Games, but also other future international sports events;
- **National Programme:** working with Devolved Administrations and UKTI's Regional Directors 60 events ran from June to September 2012, linking business opportunities to the Olympics and Paralympics. Key sectors covered include Creative Services, Creative Content, Education, Life Sciences, ICT, Energy, Infrastructure, Retail, Food & Drink and Advanced Engineering and country days on China and Brazil. 37 of these local programmes were enhanced by using either live streamed or on-demand content from the British Business Embassy Summits.

**(ii) Evidence available: Outputs & expenditure****Figure 4-20: Public expenditure on exporting and trade promotion**

Legacy programme/initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
British Business Club	UKTI	£0.15m	Not available at this time	2010 - 2012
National Programme	UKTI	Within existing budgets	N/A	2012 - 2013

**Figure 4-21: Outputs achieved**

Legacy programme/initiative	Lead Organisation	Total Outputs/KPI achieved	Units	Time period
British Business Club	UKTI	Not available at this time	Not available at this time	2010 - 2012
National Programme	UKTI	Not available at this time	Not available at this time	2012 – 2013

**(iii) Evidence available: Evaluation and research**

No project level evaluations have been undertaken to date under this theme. It is understood that future evaluation work will examine the degree to which Games-related initiatives such as the British Business Embassy and Global Investment Conference in the period leading up to and during the Games have influenced export levels.

**(iv) Conclusions: Outcomes and additionality**

There is no evidence available yet as the key interventions are occurring around Games-time.

**(v) Progress in answering the research questions**

*To what extent has hosting the 2012 Games enabled UK businesses to move into new export markets (including through export promotion in host and other nations, in support of development goals, and through the development of 'soft networks'), and what were the GVA and employment benefits?*

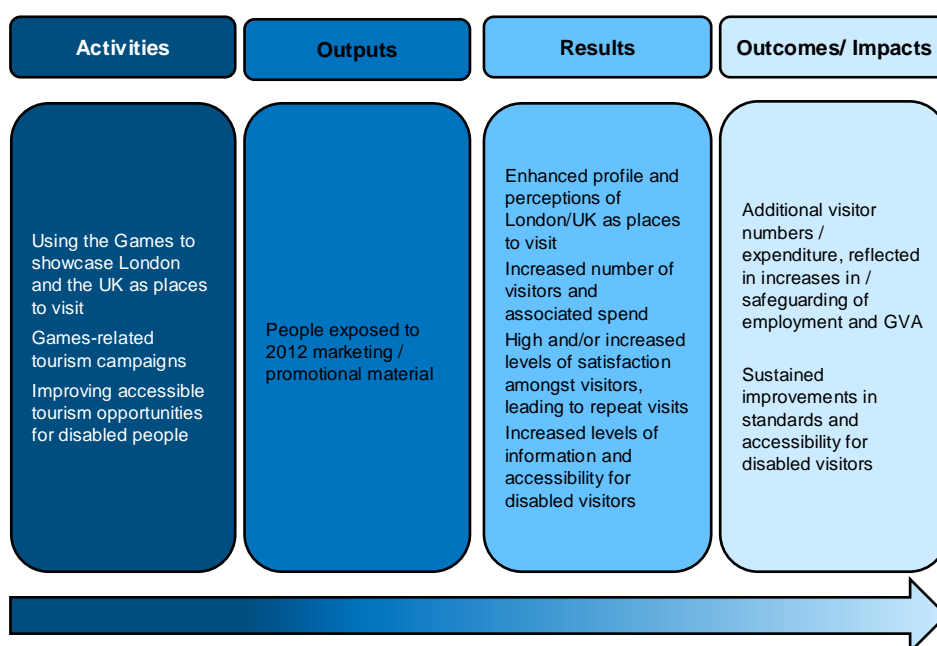
To date there is no evidence available to answer this question. In relation to the impact of Games-related contracts on export opportunities, data from the final CompeteFor evaluation will be utilised for the meta-evaluation. The evaluation's final beneficiary survey will allow a qualitative analysis of how far businesses have been able to access export markets as a result of using CompeteFor and bidding successfully for Games contracts.

## 4.6 Tourism

It is anticipated that the 2012 Games and related events such as the Cultural Olympiad will have brought a large volume of overseas and domestic tourists to London and other areas of the UK staging Games events. The 2012 Games also provided an opportunity to secure longer-term promotional impacts through using the event to showcase London as a potential leisure tourism destination.

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for the tourism sub-theme. It should be noted that while there is some limited evidence of a number of outcome achievements there is less evidence currently available around the progress made in delivering the specified results, outcomes and impacts.

**Figure 4-22: Tourism summary logic model**



### (i) Legacy programmes and initiatives

A number of major programmes and initiatives relating to the Games have been established to enhance tourism outcomes. These have twin objectives of addressing any displacement of visitor numbers that may be caused by holding the Games in London and using the Games and the events around it as a means to promote the UK as a place to visit. The key campaigns are described below:

- **You're Invited:** Visit Britain is investing around £100 million of public and private sector funding in an international marketing programme – the 'You're Invited' campaign. This aims to use the major events taking place in Britain over the next few years – including the 2012 Games – to deliver 4.6 million extra visitors from overseas and £2.27 billion in extra visitor spend over the next four years. A key pillar of the campaign is Games-motivated – i.e. to use the Games and the exposure it provides to London and the UK to inspire people to come to London/the UK in future years;
- **GREAT:** The GREAT image campaign launched in February 2012. It is designed to run alongside and complement the You're Invited campaign. This £25 million image campaign is being rolled out across 14 major cities in nine key inbound tourism markets and aims to reach an estimated audience of some 90 million people. Running until March 2013, activity is being undertaken in major cities in Australia, Brazil, Canada, China, France, Germany, India, Japan and the US with the aim of enhancing overseas perceptions of the UK as a major tourism destination as well as promoting Britain's business strengths, as noted above. Posters will also be on display at airports across the UK. The aim is to deliver a further 600k visitors and £270 million spend;

- 'Holidays at Home are Great': a £4 million programme and campaign led by DCMS and Visit England aimed at increasing domestic tourism. The programme objectives are to support the movement towards domestic holidays by using the 2012 Games to "*reinforce this trend and strengthen the future of tourism, thereby supporting the economy and employment*".<sup>65</sup> The campaign commenced in September 2011. The 2012 Games, the Olympic Torch Relay and the Cultural Olympiad will be used to market different parts of the UK. The £4 million budget is sourced from the Olympic budget;
- Limited Edition London: The overall objective of London and Partners' Limited Edition London campaign is to encourage visitors from 'core' markets to come to London during the period September 2011 to July 2012. The campaign approach stems from the effect of 'displacement' whereby potential visitors may be put off from visiting London by the Games or change their plans. It aimed to direct traffic to visitlondon.com whilst raising the profile of London & Partners – the new organisation in charge of promoting the capital. The campaign also aimed to ensure visitors knew London was open for business and home to a series of one-off events;
- Regional Tourism Campaigns Many of the nations and regions have co-ordinated campaigns to maximise the opportunities the Games has to offer for the visitor economy. For this report some evidence has been collected on the impact of the 'On Your Marks...Get Set...Go!' Tourism South East's 2012 project for the period 2011/2012.

#### (ii) Evidence available: Outputs & expenditure

The table below provides details on the expenditure associated with the key initiatives under this sub-theme.

**Figure 4-23: Public expenditure on tourism**

Legacy programme/ initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
'You're Invited' campaign	Visit Britain	£120m	Not yet available	2010 – 2014
'GREAT' campaign	Visit Britain	£25m	Not yet available	February 2012 – March 2013
'Holidays at Home are Great' campaign	DCMS/Visit England	£4m	Not yet available	September 2011 – July 2012
Limited Edition London	London and Partners	£1.5m	£1.5m	September 2011 – July 2012

Report 3 examined the policy counterfactual relating to the major national level campaigns. In all cases stakeholder evidence indicates that without the Games similar campaigns would still have gone ahead; however it is likely that they would have been on a much smaller scale. In the case of the You're Invited campaign the private sector, which is contributing up to £50 million to the campaign, would have had less incentive to invest on this scale without the Games.

<sup>65</sup> DCMS Press Release (12 September 2011).

**Figure 4-24: Tourism outputs achieved**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Units	Time period
'You're Invited' campaign	Visit Britain	Not yet available	n/a	n/a
'GREAT' campaign	Visit Britain	Not yet available	n/a	n/a
'Holidays at Home are GREAT' campaign	DCMS/Visit England	Not yet available	n/a	n/a
Limited Edition London	London and Partners	Not yet available	n/a	n/a

**(iii) Evidence available: Evaluation and research**

In broad terms the tourism sub-theme examines the impact of the Games and related events on visitor numbers and expenditure and the impact of Games-related campaigns. As noted, the campaigns have the twin aims of addressing any displacement of visitor numbers that may be caused by holding the Games in London and using the Games and the events around it as a means to promote London and the UK as attractive places to visit.

As part of the meta-evaluation a survey of visitors to Olympic and Paralympics ticketed events is being carried out to provide evidence on economic impacts and perceptions of the UK as a place to visit.

Conversion studies/evaluations of campaigns are planned to explore their contributions to overall changes in visitor numbers and expenditure (and the counterfactual position); however the results of these studies are largely not available within the timeframe of this report. This section therefore considers recent estimates of the impact of the Games on visitor numbers and expenditure and draws on some initial evidence on the impact of the campaigns to date.

*Estimates of Visitor Impacts*

Research for London and Partners undertaken by Oxford Economics provides comprehensive analysis and up to date estimates of the potential tourism benefits to London and the UK over the period 2007-2017 that will arise from London's hosting of the 2012 Games. This updates previous estimates made in 2007<sup>66</sup> and accounts for developments since 2007. This includes the negative effects of the unanticipated recession and its aftermath on economic and tourist behaviour in general, as well as more specific revised assumptions about tourist behaviour at mega-events.

Estimates are designed to cover the whole period 2007-2017, thereby seeking to capture the impact on tourism in the 'pre-Games', 'circa-Games' and 'legacy' periods.

The study addresses a particular concern that the Games could result in a net loss of tourism earnings. That expectation is based on the view that:

- Ticket sales, event attendance and gross benefits may be lower than planned;
- Large numbers of potential 'regular' tourists to the host city – and surrounding areas – would be displaced by lower-spending Games tourists around the time of the event;
- A significant number of potential 'regular' tourists would be put off from visiting the region due to concerns of over-crowding or that the city is not open for 'business as usual', both in advance of the Games and for a considerable period afterwards.

The study examines the experience of previous mega-events and concludes that some potential 'regular' tourists will postpone or cancel visits to London or the rest of the UK, while the Games participants and spectators replacing some of them will typically spend less per visit. It is worth noting that key promotional campaigns such as Holidays at Home and Limited Edition

<sup>66</sup> 'The Value of the Olympic and Paralympic Games to UK tourism', Oxford Economics, September 2007.

London are designed to stem these types of displacement effects and may help to soften some of the impacts felt by previous hosts, which the study's forecasts are based on. The key findings can be summarised as follows:

- Gross tourism gains of £1.62 billion (at 2011 prices) are expected to be generated over the entire period 2007-17 for the UK as a whole under the updated central-case assumptions. The corresponding figure for London is £1.25 billion. This is lower than equivalent estimates in the 2007 study (£2.47 billion and £1.72 billion respectively) but is still a highly significant economic contribution with a large 'legacy' effect in the years 2013-2017;<sup>67</sup>
- The pre-Games period is responsible for 18% of the estimated gross tourism benefits for London; the Games period accounts for 30%, and the remaining 52% is to be generated after the Games. The corresponding shares for UK as a whole are 16%, 24% and 60%;
- However, looking at previous mega-events it is clear that some potential 'regular' tourists will postpone or cancel visits to London or the rest of the UK, while the Games participants and spectators replacing some of them will typically spend less per visit. The value attached to such displacement is fairly significant, at £420 million for London alone;
- The net tourism gain to the UK economy of the Games is estimated to be £1.24 billion (at 2011 prices) for the period 2007-2017 once the various displacement effects have been accounted for. For London a net gain of £0.83 billion is estimated;
- Net benefits for London are likely to be split 10%, 12% and 78% in terms of the 'Pre-games', 'Circa-Games' and 'Legacy' phases, with similar phasing of benefits for the rest of the UK. To reflect uncertainty surrounding the outlook the central forecast is placed within a range of low and high impact scenarios;
- A strong benefit is still clearly expected for the years 2013-17 in the immediate 'legacy' period as London and the UK as a whole can benefit from increased visitor numbers due to exposure in international markets, and especially emerging markets. These countries, and notably China and India, were affected modestly by the recession and there remain prospects for strong growth in the discretionary spending power of their residents. A survey by Deloitte has shown that London's hosting of the Games has strongly influenced the level of engagement of the Chinese and Indian respondents, with nearly 80 per cent indicating they would like to visit Britain as a result.<sup>68</sup>

#### *Evaluation of VisitBritain's 'GREAT' Image Campaign Evaluation – First Post Wave Report*

The first wave of the pre-Olympics GREAT Image Campaign ran in Spring 2012 and focused on heritage, culture and countryside. The fieldwork for first post wave evaluation was undertaken in April-May 2012. It is important to note that the findings to date are interim. It is envisaged that there will be up to a further three 'post' waves following further advertising and a final report will be produced upon completion of the research programme.

An on-line survey was conducted amongst 4,765 respondents across 13 cities seeing VisitBritain GREAT advertising activity (over 300 interviews per city). The post-wave research followed the same methodology used in pre-wave research to ensure consistency. Pre-wave respondents were recruited who were recent international travellers and representative of the online population (eg in terms of age and gender). Post-wave respondents matched the demographic profile achieved in the pre-wave research (to ensure that any changes were not due to a different respondent profile).

The evaluation evidence shows that to date there has been very little significant movement in perceptions of the UK as a holiday destination. Focus group testing undertaken by Visit Britain showed that the ads have the power to expand perceptions of the UK. The evaluation

<sup>67</sup> A recent report by Oxford Economics for the Lloyds Banking group estimates that the additional tourism the 2012 Games attracts will contribute £2 billion to UK GDP. Of this it is estimated that approximately 17% occurs in the lead up to London 2012, 35% during the 2012 Games and 48% in the post-Games period.

<sup>68</sup> The Deloitte Consumer Review, May 2012.



acknowledges however that shifts in perception are slow, and major stimulus is needed to influence changes. The evaluation has revealed some positive results, however:

- Slight increases in level of association with 'active' holidays, being stimulating & exciting and also having museums that are cheap/free;
- Significant increase in perceptions of GB as a 'romantic' destination (in the wider sense of romance this could be linked with images of castles and countryside);
- And, importantly, the most positive shifts are amongst those who recall the GREAT image advertising;
- Messages of welcome and offer of culture, heritage and countryside were picked up from those who recalled campaign.

Importantly, the evaluation found that the campaign may have slightly influenced intention to visit which would have the effect of limiting the longer term decreases resulting from the adverse global economic situation and slightly increasing shorter term intentions for GB. This compares against a marginally weaker performance for competitors.

- Likely to visit in next 3 years: Although GB has experienced a very small decrease in likelihood to visit in the next 3 years (99% index change from 24.9% pre wave to 24.6% post wave), competitors USA, Australia and Switzerland have all seen marginally larger levels of decline (possibly indicating GB could have seen greater levels of decline in intention too without the campaign);
- Likely to visit in next year: Overall index change 110% (a very slight rise) – GB has achieved a slightly larger uplift in intention to visit in the next year than the competitor destinations tracked all competitors (Italy closest on 103% index change);
- Hong Kong (where there was no VB GREAT image campaign) shows largest decreases on both measures – a possible indication that in other cities the campaign may have played a part in lessening the impact of a downward trend;
- Amongst those who definitely recall the campaign uplift in intention is higher (127% compared to a lower average uplift of 114% amongst this same group when considering competitors and compared to a negative index change of 77% for GB amongst those who do not recall the campaign);
- Reported bookings: Show positive data for GB but must be treated with caution until tracked over a longer term (seasonality may be driver).

The evaluation estimates that if the index change between January and May in stated intention to visit in the next year (110%) translated into extra visits then this could potentially generate extra spend of £31.3 million in a year from the cities targeted by the GREAT campaign. This represents a Return on Investment of 3:1.

There are numerous ways to model this data to model a potential ROI, the 'true' figure will lie within these ranges. There is no one 'right' answer at this stage of the research:

- Between £23.5 million to £53.3 million if modelled reflecting the potential impact on leisure visits only;
- Between £33.0 million to £72.0 million if modelled reflecting the potential impact on all visits for all purposes.

Therefore the ROI would lie between just under 3:1 to just under 8:1.

Given the global economic situation, and the decreases in intention to visit competitors there is also an argument that the campaign has limited decreases in intention to visit GB (which could limit decreases in spend from these cities). If it is assumed the campaign was responsible for the uplift in intention to visit amongst those who recalled it then it could be argued that the campaign may have limited a potential downturn of £258 million (or £354 million if

considering all visits rather than just leisure) which would have been the impact if the decreases in intention to visit seen amongst non-recallers of the campaign were seen amongst all potential visitors, further waves of research are required to establish if this is a reliable indicator.

*Holidays at Home are GREAT: Interim Evaluation (June 2012)*

Visit England has provided some interim results on the outcomes of the Holidays at Home are GREAT campaign. A survey of 588 businesses that provided offers to the great2012offers.com website was completed during June 2012 using a mixture of online and telephone interviews. Businesses were asked to provide information about offer redemptions, either exact figures if these were available, or estimates where they were unable to precisely track take-up. The results from those businesses who responded were used to estimate redemptions across the whole universe of participating businesses, taking into account differences in performance by size and sector. Using this approach, it is estimated that the offers website generated direct redemptions worth £1.1 million up to June 2012. The survey will be repeated in October 2012 to produce a redemption value for the whole campaign period.

Online interviews were conducted in July 2012 with 716 individuals who had used the visitengland.com site in the three months between March and June and 255 visitors to the great2012offers.com website in the same period. Those who had taken an overnight trip in England since visiting the respective website were asked to describe the degree to which the site had influenced them to take that trip. Respondents for each site were asked whether they had visited the other site, and a downweight was applied to the results to avoid double counting. The results indicate that the two websites together generated £16.7 million in incremental spend during the three month period – £7.7 million from the offers website and £9 million for the visitengland.com website.

Interviewing for this type of evaluation usually takes place at a later point in time after the initial website visit, to allow sufficient time for an influenced trip to take place. This means that these results may well be underestimating actual impacts.

406 respondents from the VisitEngland Brand, Communications and Satisfaction survey who had taken a holiday in England in the March-May 2012 period were asked whether they had seen the GREAT advertising before taking the trip, and if so, whether the advertising had influenced them, and the nature of that influence (identifying whether this was a trip which otherwise would not have taken place).

Further questions identified the degree of duplication, ie whether respondents were also influenced by other VisitEngland marketing activity including the two websites, and downweights were applied to account for this.

Using these questions and other information about the trips taken, a calculation was made of the share of domestic tourism spending which was influenced by the advertising – 3.82%.

Final spending data for domestic holidays in the March – May period is not yet available, but the average for this period across 2010-2011 was around £2.36 billion.

Applying the 3.82% share calculated to the £2.3 billion likely holiday spending for the period results gives a figure of around £90 million – the estimated impact of the GREAT advertising *excluding* the direct impact on website visitors (the £17.7 million measured in the separate survey).

In summary, it is estimated that in its first three months, the 'Holidays at Home are GREAT' campaign has generated

- £1.1 million in redemptions for businesses providing offers to the site;
- £16.7 million in incremental spend by visitors to one of Visit England's two websites (great2012offers.com and visitengland.com);
- An estimated further around £90 million in incremental spend among those who viewed the campaign, over and above the spend generated by the website;

- A total impact in excess of £100 million.

As outlined above, this early evaluation may underestimate total impacts, particularly as it excludes any trips which might be taken over the peak summer period.

#### Limited Edition London - early evidence

The Oxford Economics research, summarised above, highlights a potential threat in the pre-Games period (2011/12) of a loss generated by 'deferred' inbound visitors which has been evident in data for arrivals, inbound spending and hotel data for previous host cities. The Limited Edition London campaign is designed to stem this displacement effect in the period leading up to the Games. A full evaluation of the campaign was due to be commissioned later in summer 2012. However, London and Partners has provided the following data on the outcomes of the campaign to date:

- Nearly 1 million additional unique visits to visitlondon.com in 6 month period (966,030 hits tracked through campaign page [www.visitlondon.com/limited-edition-london](http://www.visitlondon.com/limited-edition-london)). This included 172,000 additional hits from the UK and nearly 800,000 internationally;
- 155,000 entrants to a global competition through visitlondon.com to win a prize to come to London over the Diamond Jubilee weekend from anywhere in the world;
- 2,052 additional referrals to the website from Facebook links;
- The business tourism 'Limited Edition London VIP Card' initiative won Best PR Campaign award at EIBTM, a leading global event for the tourism and travel industry, against 3,127 exhibitors including all other city destinations, hotels and countries.

#### On Your Marks (South East 2012 campaigns)

This section summarises an evaluation of Tourism South East's *On Your Marks...Get Set...Go!* 2012 project for the period 2011/2012. The 2012 project was created to provide a structured and co-ordinated approach to maximising the tourism-related opportunities the Games could offer for the visitor economy in the South East.

The impact of Tourism South East's promotional and marketing activities on tourism flows will be measured in 2013 and 2016 (end of phase 3) drawing on national surveys and local occupancy and visitor admission data.

In the meantime, the main measures of success identified in the 2011/12 evaluation report are the scale of media exposure and AVE (Advertising Value Equivalent) directly associated with Tourism South East activities. The PR monitoring agency Metrica was commissioned to identify the number of articles in the international media mentioning the South East or one of its tracked destinations or attractions and to establish the total AVE associated with those articles. The monitoring of exposure in the domestic media and its associated AVE is yet to take place and will be reported on separately. Metrica's findings reveal that:

- During the period April 2011 to January 2012 there were 2,086 articles mentioning the South East or one of its tracked destinations or attractions in 1,927 different media outlets from printed press (national, regional and local), websites (travel, trade, news, lifestyle and blogs), consumer, travel and trade magazines (print), TV and radio;
- A breakdown of all the countries where articles have appeared indicate that exposure has travelled beyond traditional markets in Europe (Germany, France, Spain), in the English-speaking nations (USA, Canada, Australia and New Zealand), as well as developing markets in China and India, to new markets such as Russia, with one or two features also appearing in countries such as the Czech Republic, Jordan, and the Ukraine;
- The total AVE achieved by these articles is estimated to be £90,369,684. As this total AVE includes articles on the South East which were generated outside any influence exerted by Tourism South East, the marketing team have meticulously recorded all the articles and features which have been written or mentioned (eg on the radio) by journalists attending media events as well as features from journalists who have directly approached Tourism

South East for additional information and images of destinations in the region. Based on Metrica's own records they estimate that Tourism South East generated AVE during the period April 2011 to March 2012 was £3,090,936;

- The overall target for the project over the previous two years of delivery 2010/11 to 2011/12 was £5 million. Tourism South East generated AVE during the period April 2010 to March 2011 of £1.88 million. This provides a total AVE of £4.97 million.

Standards and accessibility for disabled tourists

A range of support and activity to promote disabled people's access to London through tourism were described in Report 3, and to date there is limited further evidence of their development. The most recent report of the London 2012 equality and diversity forum stated that planned work, to take place from April 2011 onwards included: accessibility improvements in tourist foot traffic hotspots, disability equality training for businesses, transport improvements (see separate section) and further online resources. Some of the projects are subject to securing funding confirmations. Time Out produced a series of guides to support disabled tourists (see Box 4-4 below).

**Box 4-4: Time Out promotes accessible London for tourists**

Time Out Guides are an official licensee of the 2012 Games. They produced a series of books and guides for the Games, all of which include information on accessibility. One specific guide focuses on an accessible London. It advises on where to go, where to eat and how to get around, and includes a section on how to access disabled sports. Prior to publication Time Out Guides Managing Director Peter Fiennes, said:

*"Ever since its launch in 1968 Time Out has had a proud record of diversity and inclusion...With the Paralympic Games coming to London in 2012 this is a great chance to produce a detailed and inspirational guide to help everyone make the most of our wonderful, but at times, frustrating city."*

**(iv) Conclusions: Outcomes and additionality**

It is estimated that the bulk of the tourism impacts associated with the Games are likely to occur in the 'Legacy' period (2013-2017) as London and the UK as a whole can benefit from increased visitor numbers due to exposure in international markets, and especially emerging markets. According to research for London and Partners, the net tourism gain to the UK economy of the Games is estimated to be £1.24 billion (at 2011 prices) for the period 2007-2017. This takes account of various displacement effects though key promotional campaigns such as Holidays at Home and Limited Edition London are designed to stem displacement and may help to soften some of the impacts felt by previous hosts. This has been demonstrated by some early evidence on the impacts of the Limited Edition London Campaign.

Many of the nations and regions have co-ordinated campaigns to maximise the opportunities the Games has to offer for the visitor economy. For this report some evidence has been collected on the impact of the 'On Your Marks...Get Set...Go!', Tourism South East's 2012 project for the period 2011/2012. A key metric to measure the intermediate outcomes of the promotional activity is AVE (Advertising Value Equivalent). The evaluation of the campaign estimates that Tourism South East generated AVE during the period April 2010 to March 2012 of £4,971,199. It is safe to assume that this activity would have been significantly less without the Games.

**(v) Progress in answering the research questions**

**What was the total impact of the 2012 Games on visitor numbers and spend (both domestic and overseas) across the UK?**

Research for London and Partners provides an indication of the expected tourism benefits from the Games. The net tourism gain to the UK economy of the Games is estimated to be £1.24 billion (at 2011 prices) for the period 2007-2017 once the various displacement effects have been accounted for. For London a net gain of £0.83 billion is estimated.

***To what extent have 2012 Games-related marketing campaigns inspired more people from overseas to visit the UK (thereby increasing visitor spend and creating new jobs)?***

There is limited data to answer this question as the first phase of campaign evaluations are to be completed later in 2012. Interim evidence on the outcomes of the GREAT campaign indicate a good return on investment in respect of potential visitor numbers and spend while initial data on the impacts of the Limited Edition London campaign suggest the campaign has had some early success in stemming the problem of displacement. The campaigns are aiming to stem any displacement of visitors arising from holding the Games in London.

***What has been the impact of 2012 Games-related cultural events on visitor numbers and spend (both domestic and overseas)?***

There is no evidence available to answer this research question within the timeframe for this report. Data on the number of visitors to Games-related cultural events from the Great Britain Tourism Survey, Day Visits surveys and International Passenger Survey (IPS) will be available in the post-Games period.

***To what extent have the 2012 Games resulted in increased standards and accessibility for disabled tourists visiting the UK (and associated levels of satisfaction and disabled visitors)?***

A range of support and activity to promote disabled people's access to London through tourism were described in Report 3, and to date there is limited further evidence of their development. The most recent report of the London 2012 Equality and Diversity Forum states that planned work, to take place from April 2011 onwards included: accessibility improvements in tourist foot traffic hotspots, disability equality training for businesses, transport improvements (see section 4.8) and further online resources.

***To what extent and in what ways has the staging of the 2012 Games impacted on perceptions of the UK as a place to visit?***

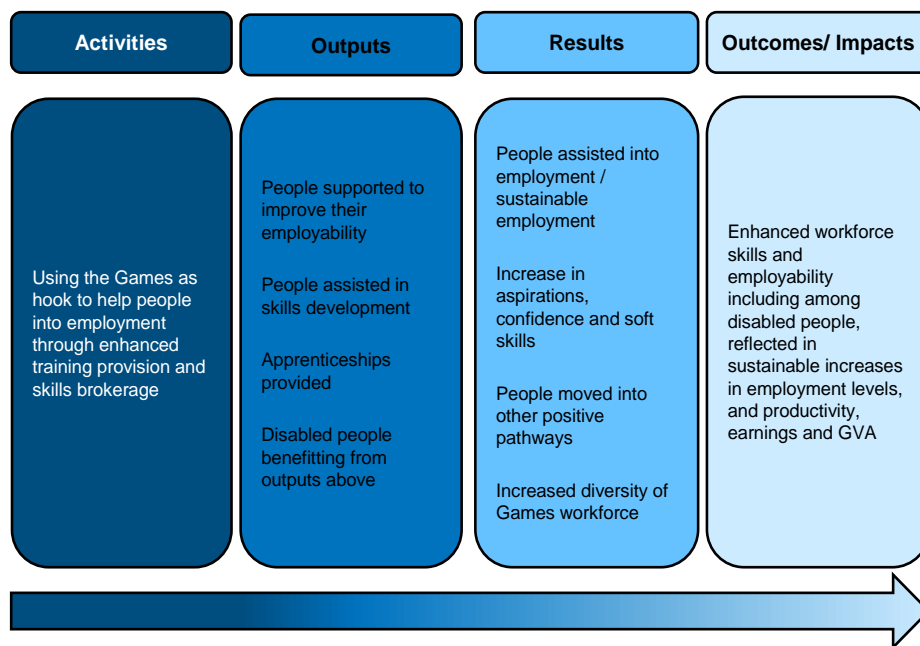
This research question will be addressed in the post-Games period. The meta-evaluation survey of visitors to Olympic and Paralympics ticketed events and the IPS will both provide evidence on how the Games have impacted on perceptions of the UK as a place to visit. There is also potential to analyse the impact of the Games on international perceptions of the UK using the Anholt Nations Brand Index.

## 4.7 Employability and skills development

The preparation and staging of the Games has presented an opportunity to help people into sustainable employment or higher-skilled jobs (particularly those that are unemployed or long-term unemployed) through effective training provision and employment brokerage. The 2012 Games can also help to address skill gaps and shortages both directly (i.e. by ensuring that the skill demands of preparing for and staging the Games are met) and indirectly (i.e. using the Games to inspire and encourage wider skills development).

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for the employability and skills development sub-theme. It should be noted that while there is evidence of a number of outputs and outcome achievements there is less evidence currently available around the progress made in delivering the specified results particularly sustainable employment.

**Figure 4-25 Employability and skills development summary logic model**



### (i) Legacy programmes and initiatives

A large number of employment and skills initiatives with a connection to the 2012 Games have been taken forward across the UK's nations and regions. The employment and skills legacy is being delivered through a partnership approach involving the Department for Business, Innovation and Skills, Skills Funding Agency (SFA), Job Centre Plus and regional bodies working together to deliver the initiatives. The SFA has contributed significant levels of match funding to a number of the key legacy initiatives including Personal Best, as detailed below.

A number of skills and employment related activities and initiatives that were in place or planned have been modified after changes to funding and/or policy. For example in the South East a further round of the Personal Best volunteer development programme did not go ahead as planned. This means that a range of Games-related skills and employment projects did not complete final evaluations and only monitoring data and case study evidence is available. It has only been possible to identify a limited number of evaluations that provide detailed and robust assessments of project achievements although one of the studies provides comprehensive evaluation evidence on the LEST programme, the key 2012 employment and skills initiative in London.

The programmes and projects which have provided good quality evaluation evidence are detailed below.

LEST 2012 (London only)

The Interim Evaluation of the London Employment and Skills Taskforce for 2012 (LEST 2012) undertaken for the London Development Agency (LDA) and Greater London Authority (GLA)<sup>69</sup> in particular provides a comprehensive and robust assessment of the additionality of impacts of projects which are linked to the Games. The LEST 2012 programme has been a major focus of London's efforts to use the Games as a hook to promote employability and skills development.

LEST 2012 had an aspirational target to reduce worklessness in London by 70,000 by the end of 2012, of which 20,000 would be from the host boroughs. The programme delivered three 'pillars' of activity across London: employer leadership; linking people, work and training more effectively; and engagement and communications. The flagship LDA projects supported by the LEST 2012 programme under each of these pillars are outlined below.

- Employer leadership
  - The Employer and Construction Accords: The Accords are a private/public partnership arrangement whereby employers commit to posting job vacancies and skills opportunities for both local people and the employers' existing workforce, while the public sector commits to ensuring these employers are provided with 'employment ready' candidates and employer-focused training.
- Linking people, work and training more effectively:
  - Local Employment and Training Framework (LETF): The LDA/ODA, as developer of the Olympic Park, was required to deliver a local employment and training framework (LETF) as a pre-commencement planning condition for developing the Olympic Park. The LETF was designed to co-ordinate local labour activities in the five host boroughs to ensure the benefits of the 2012 Games can be maximised by workless individuals from the most disadvantaged priority groups (i.e. Black, Asian and Minority Ethnic (BAME), women and disabled people). The LETF project was succeeded in 2010 by the Five Borough Employment and Skills project which has similar objectives to the predecessor project.
  - Personal Best (initially known as the Pre-Volunteering Programme): Two pilots and a pan-London roll out were supported by the LDA to use volunteering, and the excitement generated by the opportunity to become a 2012 Games-time volunteer, to improve the level of employability of London's workless population. The Learning and Skills Council funded the delivery of a new Personal Best qualification whilst the LDA supported the provision of Personal Best Advisers and reimbursement of travel and childcare costs. Phase 3 of the project (full roll-out across London) completed in December 2010. From 2008 onwards this project has been rolled out across the UK nations and regions.
  - Thames Gateway Job Brokerage: This project involved the coordination of job-brokerage provision across the Thames Gateway to raise the standard of service delivery. However, while originally envisaged to include seven east London Boroughs (including three of the five host boroughs - Greenwich, Newham and Tower Hamlets), these three Boroughs were removed from the project's remit once it became clear that provision for these areas would be delivered through the LETF and other 2012 Games focused activities.
  - Jobnet project: This project co-ordinates job brokerage services across the five Thames Gateway boroughs of Redbridge, Bexley, Lewisham, Barking and Dagenham and Havering. The aims of the project are to increase the standard of service delivery in job brokerage; to provide greater opportunities for local people; and to provide an improved recruitment service for local businesses.
  - 2012 Games-related Sector Training: This project involved the provision of training relevant to 2012 Games-related activities, with a particular focus on: customer service,

<sup>69</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix B LEST Evaluation (Final Report).

media and communications, language and cultural awareness, and green skills and land-based industries.

- Engagement and communications
  - LDA Opportunities Fund, Engagement in London 2012: This project sought to ensure London's diverse communities contributed to and shared in the benefits of London hosting the 2012 Games in the areas of employment, skills development, local business involvement and as an opportunity to increase health and attitudes to sport.

*Other Sector Skills Council and Regional Initiatives (UK)*

The Skills Funding Agency (SFA) and Sector Skills Councils (SSCs) which are linked to key Games sectors have been consulted for the meta-evaluation to identify relevant skills initiatives and evaluation evidence. Through this process evaluation evidence has been identified for the following Games-related initiatives:

- London Coaching Bursary Model (SkillsActive SSC): The London Coaching Bursary subsidised coaching qualifications for coaches delivering coaching in London. The project addressed the need for more and higher qualified sports coaches, especially those qualified to levels 1 and 2.
- The East-links - Leading the Field: Focusing on the East of England this project offered fully funded training courses for individuals employed or regularly volunteering in the sport and active leisure sector.
- Personal Best Programmes (outside London): Personal Best was gradually rolled out throughout the English regions and Scotland after the initial pilot in London (described above).
- Team East for Skills: Volunteering into Employment programme, which was funded by the European Social Fund (ESF) and Legacy Trust UK and operated in the East of England. The programme started in February 2009 and the delivery of courses ended in December 2011.

Other significant employment and skills initiatives have been identified where evaluation evidence is currently not available:

- Bridging the Gap: has supported 4,000 students and unemployed to complete stewarding and/or door supervision qualifications.
- Sustained engagement in education, employment or training for young people aged 14-19 (ESF project, host boroughs). This European Social Fund (ESF) project has provided opportunities for participants to access jobs resulting from the 2012 Olympics and Paralympics and will continue to 2014. Newham College was awarded the contract. Their programme offers support to young people within the host boroughs aged 14-19 who have been identified as being 'at risk of becoming NEET (Not in Education, Employment or Training). The participants are already enrolled in a school, college, Pupil Referral Unit or other learning provider or employed/on an Apprenticeship programme.
- Skills Support for the Unemployed - Olympics (ESF project). As many of the employment opportunities created by the Games were short-term (some in the region of 8 to 12 weeks in length), this project provided skills support which focused on sectors where longer-term employment opportunities may be created (26 weeks or more), either with or in support of the Games and working either with established LOCOG contractors or within the local economy where capacity was needed. At the end of the recruitment part of the programme, 2,276 individuals started the programme and began a skills programme. The full impact of how many people have gained longer-term employment will not be known until later in 2012.
- Skills Support for the Unemployed – Westfield Skills Place (ESF Project). The aim of this project was to ensure adults (aged 18 and over) were given the right level of skills and employability support they needed to gain employment / start new Apprenticeships with employers who were located within Westfield Stratford City. Individuals who successfully



completed the pre-employment training offer could apply for and gain an interview with employers with Westfield Stratford City. The provider worked with the Westfield Stratford City Skills and Employment team and Seetec, appointed as the preferred supplier for the National Skills Academy facility in Westfield Stratford City in all aspects of planning, funding, curriculum development and core and specialist bespoke delivery. The College has started 1137 individuals on a pre-employment programme of which 50 to date have secured employment although the full impact of the training intervention will not be known until May 2013 when a full evaluation will be submitted.

**(ii) Evidence available: Outputs & expenditure**

As noted, LEST is the most significant programme under this theme. At the time of the LDA evaluation the group of projects that comprise the LDA Opportunities Fund had received the largest share of LEST 2012 expenditure at just over £10.4 million. Other large projects within the programme include the Local Employment and Training Framework (£9.9 million) Personal Best (£6.9 million) and the combined Employer Accords (£5.7 million). Only four LDA projects were taken forward into 2011/12 (the Five Borough Employment and Skills project, elements of the Construction Accord, Jobnet Job Brokerage, and LEST 2012 Engagement and Communications) that were considered in the evaluation.

**Figure 4-26: Public expenditure on employability and skills development**

Legacy programme/ initiative	Lead Organisation	Budget (£m) <sup>70</sup>	Actual (£m)	Time period
LEST (total)	LDA	£64m	£49.6	2006/07-
<b>Major LEST Projects</b>				
The Employer Accord	LDA	£1.2 m	£1.2m	April 2007 – March 2011
Construction Accord	LDA	£4.6m	£3.1m	April 2007 – March 2013
Transport Accord	LDA	£1.3m	£1.3m	September 2007 – March 2011
Local Employment and Training Framework (LETF)	LDA	£9.9m	£9.9m	September 2005 – December 2009
Five Borough Employment and Skills project	LDA	£11.4m	£2.4m	April 2010 – March 2013
Personal Best	Skills Active	£6.8m across the UK (including £3.5m in London)	£6.8 across the UK (including £3.5m in London)	2006/07 – December 2010
Thames Gateway Job Brokerage	LDA	£3.7m	£3.7	April 2006 – March 2009
Jobnet	LDA	£1.5m	£0.9m	May 2009 – March 2012
2012 Games-related sector training	LDA	£2.1m	£2.1m	October 2007 – March 2010
Opportunities Fund, Engagement in London 2012	LDA	£10.4m	£10.4m	April 2007- March 2010
Olympic Park National Skills Academy for Construction (NSAFC)	ODA	£0.6m	Data not available	November 2008 -
<b>Other Key Initiatives</b>				
East Links	Skills Funding Agency	£1.3m	£1.3m	April 2009 – March 2001
Team East for Skills	Skills Active and Partners	£2m	£2m	February 2009 – December 2011

*Additionality*

The LDA's Interim Evaluation of LEST's analysis of the policy counterfactual is based on consultations with the LDA and relevant stakeholders. The evaluation concludes that in the absence of the Games it is highly unlikely that the LEST 2012 platform would have been developed to its size and structure with the same strategic focus. Consultations with key LDA staff and stakeholders undertaken for the LDA evaluation indicate that the decision to award the Games to London provided a one-off opportunity to secure a step change in the

<sup>70</sup> Budget and actual expenditure figures for the LEST projects relate to LDA expenditure only.

coordination and quality of London's employment and training services. The evaluation indicates that the Games made it easier to secure joint strategic commitment and ownership.

Whilst the evaluation acknowledges that a large number of projects funded under the LEST 2012 programme were using the 2012 Games as a hook to enhance activity rather than input directly into the 2012 Games, its analysis suggests that eight LDA projects (out of 21) would not have gone ahead in their current form if London had not bid for and been awarded the Games. These projects are listed below:

- Personal Best;
- The Local Employment and Training Framework and Five Host Borough Employment and Skills (specifically the construction employment brokerage component which formed the original focus for the former);
- Olympic Engagement Large Scale Events;
- Relay London Jobs;
- Olympic Forecasting Function;
- Olympic Opportunities Fund (Theme 3 only: opportunities for engagement in 2012);
- Construction Accord (Olympic Site Based Coordinators contract only).

The Local Employment and Training Framework, the LDA Opportunities Fund and Personal Best are three of the programme's largest projects totalling over £25 million of spend.

With respect to the non-LDA funded projects, the evaluation concluded that two (out of four) inputted directly into the 2012 Games. As a result, it was concluded that they would not have existed in name or current form if London had not bid for and won the right to host the 2012 Games. These projects are the National Skills Academy for Construction – Olympic site and the Jobcentre Plus Joint Coordination Team.

For the remaining LEST 2012 projects the LDA evaluation indicates that analysis of a 'no bid' scenario is less straightforward, although it is considered that to greater and lesser extents the form of all projects has been influenced by the hosting of the 2012 Games.

The table below shows that the gross outputs identified under this sub theme to date.

**Figure 4-27: Employability and skills development outputs achieved**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Units <sup>71</sup>	Time period
LEST	LDA	Business Support	1,748	2007-2011
		Employability Support	57,561	2007-2011
		Job entry	1,609	2007-2011
		Jobs generated or safeguarded	5	2007-2011
		Skills general	24,739	2007-2011
		Skills development	2,797	2007-2011
		Skills level 2	2,209	2007-2011
		Sustained business start-up	211	2007-2011
		Sustained employment for 26 weeks	107	2007-2011
		Sustained employment for 52 weeks	512	2007-2011
Personal Best	SkillsActive	People enrolled on programme	8,577	2006/07 – Dec 2010
		Skills level 1	4,462	2006/07 – Dec 2010
		People progressing to employment	240	2006/07 – Dec 2010
		People progressing to education/training	736	2006/07 – Dec 2010
		People progressing to further volunteering	181	2006/07 – Dec 2010
Team East for Skills	SkillsActive & Partners	Employability Support	1,546	Feb 2009 – Dec 2011

The table shows that large numbers of employability support and skills general outputs were achieved under the LEST programme – 57,500 and 24,500 respectively.

*Personal Best (outside London)*

SkillsActive, the sector skills council for the sport and leisure sector, worked as project manager for Personal Best, overseeing the regional coordinator of delivery of the programme since March 2010, under the direction of the Personal Best National Delivery Board. Skills Active has produced a report on the Personal Best programme across the UK. The report focuses on outputs and intermediate outcomes. Below are some of the key findings:

- 8,577 individuals have been enrolled onto the Personal Best programme across the UK;
- 5,053 Personal Best learners have completed the programme;
- 4,462 Personal Best learners have achieved the Level 1 qualification in ‘*preparation for event volunteering (Personal Best)*’ and received their certificates;
- Personal Best learners have delivered over 101,060 hours of volunteering in the last 3 years across the UK at various sporting events and voluntary work for the community;
- Personal Best has attracted over 44.6% of its participants from BME communities;
- 23.5% of participants have a long term disability/health or learning difficulty;
- 976 achievers have found employment or gone on into further training or employment after completing the Personal Best programme;

<sup>71</sup> The units for the employability and skills outputs refer to numbers of individuals.

- 54 centres of training offer Personal Best programme in England and Scotland, including FE colleges, national organisations and private training providers;
- All providers have shown interest in continuing to deliver the qualification;
- 1,107 Personal Best achievers have applied to become a Games Makers and volunteer at London 2012 Olympic and Paralympic Games.

The box below provides an illustrative example of a Personal Best pilot.

#### **Box 4-5: Scottish Personal Best Pilot**

The Scottish Personal Best pilot was launched in Glasgow in August 2010 to test whether the Personal Best programme could be rolled out across Scotland to help achieve a greater legacy from the 2014 Glasgow Commonwealth Games. The evaluation of the Scottish Personal Best Pilot found that the pilot has been very effective at engaging the traditionally hard to reach long-term unemployed, male client group. Three-quarters of participants had been unemployed for at least one year and many have additional barriers.

Given the challenging nature of the client group, the evaluation concluded that the pilot's outcomes are impressive:

- 84% of starters completed the 10 week course;
- 47% of completers entered employment;
- 53% of completers entered further education or training;
- 85% of completers engaged in further volunteering;
- 96% of Personal Best participants surveyed were either very satisfied or satisfied with the pilot. 82% felt it would help them to get a job.

#### *Employment Opportunities for Diversity Groups*

Output data from evaluations of individual LEST projects indicate some strong achievements regarding engagement with disabled people:

- The Relay London Jobs project overachieved against its output target for assisting disabled people into employment with 49 skills outputs achieved in this category;<sup>72</sup>
- Performance against targets for participation by disabled people in the Games Related Sector Training Projects was generally strong with 42 disabled people participating in the projects (9.4% of participants against a target of 10%);<sup>73</sup>
- Beneficiaries of the LETF project who reported being disabled accounted for 8% of the overall number.<sup>74</sup>

The ODA has provided cumulative figures up to December 2011 on the total number of people employed on the Olympic Park from the three equality groups, as follows:<sup>75</sup>

- Of the total Olympic Park contractor workforce (including the Athlete's Village) 3.7% were women, and of those in manual trades 2% were women. This is above the UK manual construction benchmark of 1.2% but below the ODA benchmark percentage of 11%;
- The percentage of the total Olympic Park workforce who were disabled was 1%<sup>76</sup> which is below the ODA benchmark of 3%;

<sup>72</sup> Ecorys (2011). London Development Agency: Evaluation of LEST – Relay London Jobs (Final Report).

<sup>73</sup> Ecorys (2011). London Development Agency: Evaluation of LEST – Games Related Sector Training (Final Report).

<sup>74</sup> RTP (2009). London Development Agency: Evaluation of LETF (Final Report).

<sup>75</sup> ODA, Employment and Skills Cumulative Statistics, April 2008-December 2011.

<sup>76</sup> Completion of this question, and that on ethnicity was voluntary. The data is based on valid responses, which is lower than the total workforce numbers.

- The percentage of the total Olympic Park workforce that were of black, Asian or minority ethnic origin (BAME) was 14%, which was below the ODA benchmark of 15% but above the UK manual construction benchmark of 3%.

The ODA Job Brokerage, which helps local residents access jobs, has performed well against its equality targets. The diversity of those people placed into work by the ODA's Jobs Brokerage is as follows (with benchmark targets in brackets):<sup>77</sup>

- Women - 17% (11%)
- Disabled People - 6% (3%)
- BAME - 60% (15%)

### **(iii) Evidence available: Evaluation and research**

The interim evaluation of LEST<sup>78</sup> provides a detailed examination of the impact of the 2012 LEST projects up to April 2011. The focus of the evaluation is all LDA-funded LEST 2012 projects as well as the LDA's overall co-ordination role in delivering the LEST 2012 Action Plan. In addition, recognising that the LEST 2012 Action Plan includes a number of important non-LDA funded projects, a secondary focus of the Interim Evaluation is on these activities. The analysis below refers to separate evaluations of specific LEST projects where additional evidence has been identified that help to answer the meta-evaluation questions for example on disability.

The principal evidence base for the LEST 2012 Interim Evaluation is a survey of LEST 2012 beneficiaries. The survey was conducted between April and May 2011. The evaluation notes that from an estimated LEST 2012 beneficiary population (to date) of around 50,000, in total, 2,009 beneficiaries took part in the survey.<sup>79</sup>

Key findings from the survey which focused on the beneficiaries that were out of work prior to the support included:

- Almost half of beneficiaries (46%) were aware of the link between their support and the 2012 Games. Almost a third (31%) of these beneficiaries felt this knowledge influenced their decision to access the support;
- One third of those not in paid/self-employment prior to the support went into paid or self-employment after the support had finished. Forty-three per cent had not entered into employment;
- Nine per cent of those unemployed or looking for work found a volunteering placement;
- Two thirds of beneficiaries felt that their path to employment would have been hindered in the absence of the support, including 15% who felt they 'definitely' would not have found employment without the training support. For the latter group, their employment can be completely attributed to the support/training received through the LEST 2012;
- Over one third of beneficiaries gained new skills (35%) and/or a qualification (36%) as a result of their involvement in the programme, which on the whole provided new skills rather than covering skills beneficiaries already had. Personal Best beneficiaries most commonly gained qualifications from their training/support.

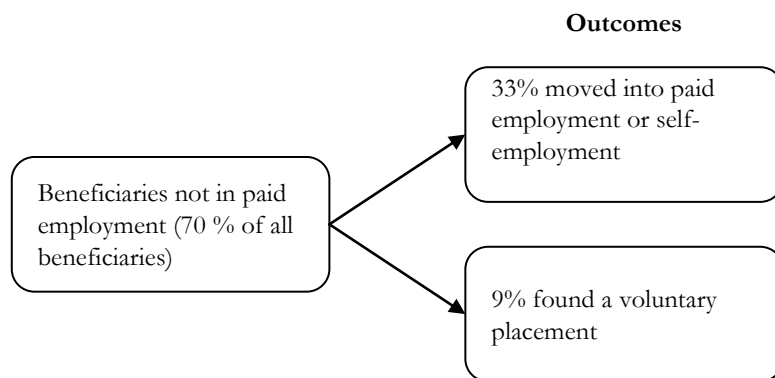
The key results regarding those who were not in paid employment/self-employment are presented in the diagram below.

<sup>77</sup> ODA Job Bulletin (July 2011).

<sup>78</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix B LEST Evaluation (Final Report).

<sup>79</sup> In terms of statistical robustness, the survey achieved the following: At the London wide level, a Confidence Interval of +/- 2.1% at the 95% Confidence Level (unweighted results); and at the five host borough level, a Confidence Interval of +/- 3.7% at the 95% Confidence Level (unweighted results).

**Figure 4-28: Beneficiary Outcomes (LEST)**



The economic impacts of the LEST programme are considered in (v) below.

London Coaching Bursary Model (SkillsActive SSC)

The following conclusions are drawn from evaluations on the Pilot Phase and Phase 2 of the London Coaching and Bursary Model although these are based on output data only:

- Overall the pilot phase of the project has proved to be a success, exceeding original targets set by the funding partners (i.e. 400 beneficiaries) and enabling around 560 individuals to obtain some form of coaching qualification;
- As with the pilot phase of the programme, Phase 2 of the London Coaching Bursary has proved to be a success, exceeding original targets set by the funding partners (800 beneficiaries) and enabling over 1,200 individuals to obtain access to funding to undertake a coaching qualification. Teamed with the allocations for the pilot phase, the Coaching Bursary programme has provided support for 2,090 participants in London to gain a coaching qualification. The additional funding strands for Phase 2 of the scheme will ensure that even more qualifications are delivered in the capital.

Other Sector-focused skills development projects

The boxes below provide illustrative examples of evaluation evidence on other sector focused skills projects.

**Box 4-6: South East Tourism Skills Project**

The aspiration has been to use the Games to encourage visitor facing businesses to embrace the ethos of great customer service and by doing so enabling people to acquire skills which will last well beyond the Games and contribute to the human capital of the region. Over the course of the 2012 project the training department of South East Tourism has organised, and delivered, tailor-made and accredited (City and Guilds) Welcome Host and Welcome Host Gold suite of courses. The team worked closely with local authorities, Local Enterprise Partnerships, Destination Marketing Organisations and others to drive participation, particularly in the Gateway Areas.

In total 2,471 individuals received the Welcome Host Gold training overall for the year against a target of 2,500.

*Source: Tourism South East On Your Marks 2012 Evaluation Report*

**Box 4-7: East Links Leading the Field**

During 2009/2010 the role out of a new £1.3 million European Social Skills project provided investment in to Sporting skills in the region. The Inspire Marked project sought to provide relevant training to individuals employed and working or volunteering in the sport sector. The project offered a range of training including sports coaching, health and fitness qualifications, officiating courses and management and leadership support. The project targeted to reach a total of 1275 participants as follows: 750 coaching qualifications, 200 officiating qualifications, 25 coach tutor qualifications, 100 health and fitness qualifications, 100 leisure facilities/operator qualifications, 100 community sport qualifications such as mentoring and 100 organisations were to receive management development support and advice. The project worked in collaboration with the Team East for Skills and Personal Best programmes operating in the Region. The programme was completed by August 2010 with a total of 1,638 people receiving support, with all of the above targets being exceeded.

**(iv) Conclusions: Outcomes and additionality**

The interim evaluation of LEST provides estimates of the net employment outcomes and economic impacts of LDA-funded projects within the London Employment and Skills Taskforce for 2012 (LEST) programme on the five host boroughs and the London economy as a whole. The study takes into account deadweight and substitution effects (displacement and multiplier effects are assumed to be zero). There is some lack of clarity in report regarding how these effects were estimated from the beneficiary survey but the estimates do not seem unreasonable compared to national benchmarks. In fact the estimates of deadweight are found to be particularly high, suggesting that the estimates of net impact are relatively conservative:

- Based on results from the beneficiary survey, 39% of all beneficiaries and 32% of beneficiaries in the five host boroughs were supported into jobs. Extrapolating this across all beneficiaries, it was estimated that LDA-funded projects enabled 18,844 jobs in London to be filled by the end of 2010/11, of which 5,178 were in the five host boroughs;
- The LEST programme was just short of its trajectory to reduce worklessness in London by 70,000 by 2012 – by the end of 2010/11 the programme had helped 34,500 into employment against a milestone of 36,000 for that year;<sup>80</sup>
- It should be noted, however, that jobs are expected to last for just a year on average, so these impacts are assumed to be relatively short term;
- Nevertheless, the study does not address the potential effects of beneficiaries moving into jobs in the future as a result of the support received, which would boost the overall impacts;
- GVA impacts are based on the average salary of beneficiaries experiencing a job start, as reported in the survey, adjusted by a constant factor to estimate the value of the total annual productivity of the average beneficiary entering employment. This is multiplied by the estimated net number of job starts to give a total GVA impact of £219 million, of which £54m is generated in the five host boroughs. These are cumulative figures, as job starts are assumed to persist for one year on average.

**(v) Progress in answering the research questions**

*How many workless people were helped into sustainable employment as a result of preparing for and staging the 2012 Games and the conversion of legacy venues across the UK, and how?*

The key initiative aimed at helping workless people into employment through the Games is the LEST programme of employability and skills projects in London. Evaluation evidence is available on progress towards the target to reduce the number of workless people in London. The LEST evaluation indicates that the programme was just short of its trajectory to use the Games to reduce worklessness in London by 70,000 by 2012 – by the end of 2010/11 the

<sup>80</sup> The figures on reduction in worklessness should not be compared to the job impacts of construction in section 4.1. It is important to note that the reduction of worklessness figures relate to the impacts of Games-related programmes which cover a wider range of activity than the direct impacts of construction.



programme had helped 34,500 into employment against a milestone of 36,000 for the end of that year. It should be noted, however, that jobs are expected to last for just a year on average, so these impacts are assumed to be relatively short term and further research would be needed to examine how far the projects have enabled people to move into sustainable employment.

***How many people have developed new skills (and moved into sustainable employment) as a result of 2012 Games-related skills initiatives across the UK, and how?***

The evaluation of LEST indicates that the Games has enabled around 25,000 people in London alone to gain new skills. There is a strong suggestion in the evaluation that these new skills have been instrumental in helping people into employment. A number of skills and employment related initiatives and evaluations that were in place or planned have been modified after changes to funding and/or policy. This means that a range of Games-related skills and employment projects did not complete final evaluations and only monitoring data and case study evidence is available. The evaluations of the London Coaching Bursary and Personal Best programmes provide illustrative evidence of significant Games-related impacts across the nations and regions in relation to qualifications gained and employment outcomes.

***To what extent have the 2012 Games been used to improve standards and access to employment opportunities amongst disabled people, including through volunteering, skills development and through changing employer perceptions?***

There has been limited evaluation evidence thus far on the success in improving opportunities amongst disabled people. The available data shows that LEST projects have exceeded targets for involving disabled people, however it is not possible to draw meaningful conclusions yet.

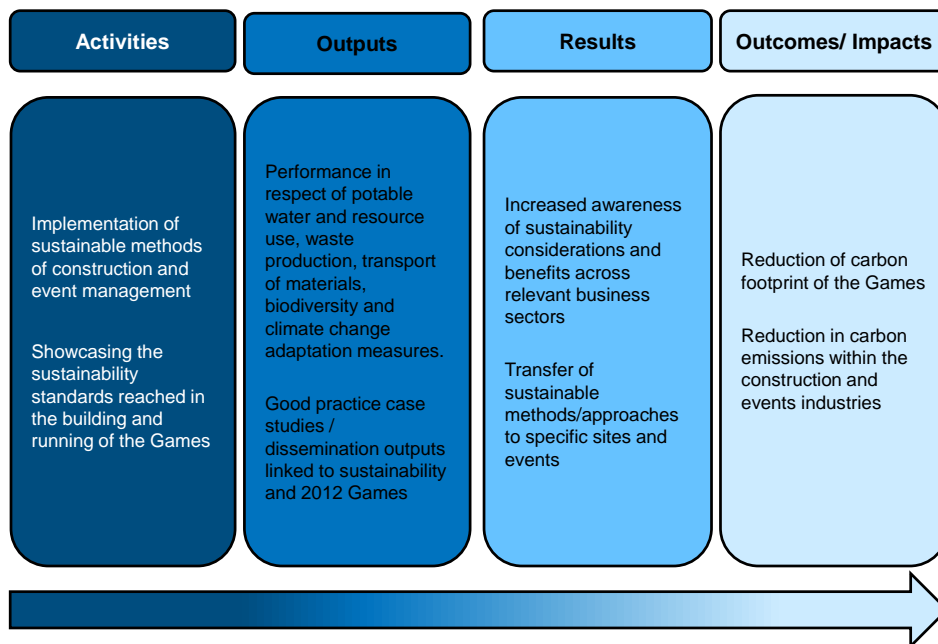
## 4.8 Promoting sustainable business

The global profile of the 2012 Games and the scale of the Olympic Park development create significant potential for learning and good practice in the area of sustainability. The planning, design, construction, procurement and staging of the Games all have the potential to contribute to the creation of a sustainability legacy. Sustainable procurement practices would be expected to generate a range of environmental benefits and the introduction of such policies can also be used as a lever to encourage wider adoption of good practice within the supply chain thereby generating further benefits. The embodiment of principles of sustainable development in the staging of the Games would also provide significant environmental benefits (compared to benchmark figures), more so if good practice is shared and adopted more widely.

Key questions relating to sustainability under the economic theme relate to the environmental impacts of the preparation of the Games (i.e. the construction of venues and its infrastructure) and the staging of the Games, and the wider demonstration effects and benefits for green business.

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for the promoting sustainable business sub-theme. It should be noted that while there is evidence of a number of outputs and outcome achievements there is less evidence currently available around the progress made in delivering the specified results and outcomes.

**Figure 4-29: Promoting sustainable business summary logic model**



### (i) Legacy programmes and initiatives

LOCOG and the ODA have committed to a number of carbon reduction measures as set out in the ODA Sustainable Development Strategy and London 2012 Sustainability Plan.

The ODA sought to deliver sustainable developments through the advancement of the following environmental objectives:<sup>81</sup>

- Carbon: To minimise the carbon emissions associated with the Olympic Park and venues;
- Water: To optimise the opportunities for efficient water use, reuse and recycling;
- Waste: To optimise the reduction of waste through design, and to maximise the reuse and recycling of material arising during demolition, remediation and construction;

<sup>81</sup> ODA Sustainable Development Strategy.

- Materials: To identify, source, and use environmentally and socially responsible materials;
- Biodiversity and ecology: To protect and enhance the biodiversity and ecology of the Lower Lea Valley, and other venue locations;
- Land, water, noise, air: To optimise positive and minimise adverse impacts on land, water, noise, and air quality;
- Transport and mobility: To prioritise walking, cycling and the use of public transport to and within the Olympic Park and venues.

Major Games-time commitments from the London 2012 Sustainability Plan are as follows:

- Use a low emission vehicle fleet;
- Minimise impacts of Games-time transport and travel planning;
- ‘Green travel plans’ for ticketed spectators and workforce;
- Low/zero-carbon Olympic and Paralympic flames;
- To stage a zero waste Games, (within ‘closed-venues’); and ensure that the amount of Games waste produced will be minimised;
- Develop an approach to minimise risks and maximise the reuse and recycling of materials and products arising from the Games overlay, both during the transition from Olympic to Paralympic staging and post-Games breakdown;
- Work with the packaging industry, the National Non-Food Crop Centre and WRAP to identify deliverable solutions for food and catering packaging systems;
- Develop an integrated Games Waste and Resource Management Plan;
- Review recycling labelling options already in existence, any plans to develop such schemes and the experiences of those using and delivering these labels.

Through the Learning Legacy project, the Olympic Delivery Authority and LOCOG have aimed to share the knowledge and the lessons learned from the construction of the Olympic Park and staging of the Games to help disseminate and improve the take-up of good practice in sustainable approaches to construction and the management of large-scale events.

**(ii) Evidence available: Outputs & expenditure****Figure 4-30: Public expenditure on sustainability**

Legacy programme/ initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
ODA programme	ODA	Not yet available	n/a	n/a
LOCOG programme	LDA	Not yet available	n/a	n/a

The KPIs achieved to date under this sub theme are set out in the table below. These are discussed further in the section (iii) below. The Learning Legacy outputs are the materials produced by ODA and LOCOG to capture good practice and lessons learned from the implementation of particular sustainability approaches, as follows:

- Micro reports– technical reports which describe the approach to sustainability of a particular element of the construction process and lessons learned;
- Sustainability Champion Products – the strategies, plans and procedures that have been applied to the construction of the Olympic Park and facilities that could be applied elsewhere;
- Case Studies – narratives on the organisation and governance of various elements of the sustainability.

Details on the number of documents produced are set out in the table below.

**Figure 4-31: Sustainability key outputs/KPIs achieved**

Legacy programme/initiative	Lead Organisation	Total Outputs/KPI achieved	Units	Time period
ODA Sustainability Strategy	ODA	Permanent venues to be at least 15% more energy efficient than 2006 building regulations;	-	2008-2012
		BREEAM excellent rating for all permanent venues	-	2008-2012
		At least 20 per cent, by value, of construction materials of a reused or recycled source;	-	2008-2012
		CCHP plant built as part of an onsite energy centre, allowing more efficient distribution of electricity and heat recycling;	-	2008-2012
		Major non-potable water network installed for toilet flushing in venues, irrigation and processing in the Energy Centre;	-	2008-2012
ODA Learning Legacy	ODA	Micro Reports	30	2008-2012
		Sustainability Champion Products	15	2008-2012
		Case studies	17	2008-2012

**(iii) Evidence available: Evaluation and research**

The key sources of evidence to date relate to the review work undertaken by the Commission for Sustainable London 2012 (CSL).

*Integration into planning, design and governance*

CSL has consistently praised the integration of sustainability into the planning, design and governance of the Olympic Park through a series of reports and reviews. As noted in the latest CSL Annual Review, the overall sustainability agenda continues to be led by the London 2012 Sustainability Group. This is now co-chaired by the GLA Executive Director of Environment and Development and Defra's Director for Sustainable Development. It is attended by Heads of Sustainability for the Key Stakeholders and contributors from significant wider stakeholders such as DCLG, Defra and NHS London. CSL's assessment is that the London 2012 Sustainability Group provides clear leadership over all aspects of sustainability.<sup>82</sup> CSL noted that the London 2012 Sustainability Group ODA has been instrumental in the publication of the ODA's learning legacy website and dissemination activities.

In respect of the legacy of the Olympic Park, CSL have been highly critical in the past of the lack of direction from the Olympic Park Legacy Company (OPLC) in relation to governance

<sup>82</sup> Commission for a Sustainable London 2012, Pre-Games Report Annual Review 2011/12.

for sustainability. However, the March 2012 CSL review of legacy acknowledges the substantial strides made by OPLC towards a comprehensive approach to governance for sustainability.<sup>83</sup> CSL recognise that new governance structures have been put in place to ensure that environmental sustainability is considered in a cross-cutting manner across the organisation.

CSL also welcomes the organisation's commitment to establishing an external Design Quality Panel to peer review the organisation's spatial approach.<sup>84</sup> It is argued that this could be further strengthened by ensuring that the new LLDC Board includes a position with dedicated sustainability responsibilities, and by considering how its work can be externally assured as well as broadening its external advice beyond design/spatially related matters.

#### Construction and Infrastructure

In the 2012 annual review<sup>85</sup> CSL notes that throughout the programme the ODA has demonstrated exemplary standards of construction sustainability. The report highlights that there is clear evidence that standards were applied and enforced through the procurement, risk management, and contract management processes, and in everyday construction on site, as confirmed by the Environment Agency and other statutory bodies such as the Health and Safety Executive and Natural England.

The report indicates that almost all the commitments in the ODA's Sustainable Development Strategy have been achieved or exceeded, or are on target to do so where work continues. Notable achievements include the Games achieving well over the 90% waste targets, the Velodrome being over 30% more energy efficient than 2006 building regulations and reducing potable water demand by 75%, the stadium having over 30% recycled content and the aquatic centre reducing potable water demand by over 30% through reuse of filter backwashing water for non-potable requirements.

The exception noted by the CSL review, is the target to have a 20% contribution to on-site energy from renewable sources, which was unable to be met following the failure of a tender process to deliver a large-scale wind-turbine on the Park due to legal issues relating to the design specification.

The CSL Annual Review highlights the following notable achievements in respect of the Park's infrastructure:

- The ODA has been successful in providing a CCHP solution and heating infrastructure. This system combines with a similar system developed for the Westfield shopping centre and has the potential to act as a catalyst for efficient energy generation and distribution in the Lower Lea Valley;
- The ODA has exceeded expectations in the area of non-potable water. By implementing park-wide non-potable water infrastructure and working with Thames Water to introduce the UK's first large scale membrane bio-reactor, the Park is able to recycle black water for a wide range of non-drinking uses, including providing the water supply to the district heating system. However, it should be noted that this is an energy-intensive process and that the additional energy burden was a contributory factor to the ODA needing to seek solutions outside of the Olympic Park to meet the carbon target;
- In order to achieve BREEAM<sup>86</sup> 'Excellent' ratings for the venues it was necessary for the ODA and BRE to work together to develop a bespoke version of BREEAM to be applied to sport venues and the Park itself. This provides a legacy for future construction of sport venues;
- The Athletes' Village is the UK's first major housing development to be built to Code for Sustainable Homes Level 4. This has proved to be a significant challenge but CSL is

<sup>83</sup> Commission for a Sustainable London 2012, Assuming a Legacy – promises, progress and potential: a review of legacy across the London 2012 programme, March 2012.

<sup>84</sup> Commission for a Sustainable London 2012, Assuming a Legacy – promises, progress and potential: a review of legacy across the London 2012 programme, March 2012.

<sup>85</sup> Commission for a Sustainable London 2012, Pre-Games Report Annual Review 2011/12.

<sup>86</sup> British Research Establishment Environmental Assessment Method.

currently confident that this will be achieved. This objective will need to be finally confirmed by post-occupancy reviews by the legacy owners.

#### Procurement Practices

In 2011 LOCOG was independently certified to the standard BS 8901:2009 'Specification for a sustainability management system for events'. LOCOG has noted that the standard itself was inspired by London 2012.<sup>87</sup> This was highlighted by CSL as a significant achievement for an Olympic and Paralympic Games, with London's Games being the first to achieve certification to a standard of this nature.

In June 2012 LOCOG's BS 8901 certification was novated to a new standard, ISO 20121. This new standard is designed to "*support the organisers of events of all types – sporting, business, cultural, political – in integrating sustainability with their activities*".<sup>88</sup>

In 2008, CSL recommended that "*All users of the London 2012 Brand should be required to demonstrate how they will contribute to the London 2012 Sustainability Plan and relevant objectives*". In its latest Annual Review CSL indicated that this is happening through the procurement and commercial processes, through functional sustainability targets and with partners such as existing venue operators. The review also highlighted the good progress the Cultural Olympiad programme has shown and evidence that sponsors and commercial partners are making increasing contributions to the sustainability agenda. Examples of this are support for the food vision and sustainable sourcing code, cultural Olympiad events addressing sustainability and provision of low emissions vehicles.

In February 2012 LOCOG established an agreement with the TUC and the Playfair 2012 Campaign which set out a package of measures to introduce fairer working conditions at its production locations. According to LOCOG's pre-Games report this will create a valuable learning legacy for future Games.<sup>89</sup>

#### Staging of the Games

LOCOG aspired to set new standards of sustainability for the Games and create a powerful knowledge legacy for more sustainable event management.<sup>90</sup> LOCOG adopted 10 sustainability objectives that were identified as being most material to the delivery of its overall aim of setting new standards of sustainability for the Games and creating a powerful knowledge legacy. In February CSL undertook a review of the sustainability commitments that needed to be delivered at or immediately around Games-time.<sup>91</sup> This involved reviewing a sample of the preparations being made to ensure that London 2012 is on track to meet the commitments and to provide assurance over the likelihood that they will be met. This review focused on operational delivery at Games-time to ensure that sustainability commitments are met.

Key findings of the review reveal:

- Good progress was being made towards meeting the challenging commitment to zero Games-time waste going to landfill, with at least 70 per cent to be reused, recycled or composted. The plans to deliver the 'food vision', which aims to achieve aspirational targets for the quality of food served at the Games, were developing well, with the main caterers on board and going out to the market for suppliers that can meet the requirements;
- CSL expected LOCOG to be able to assure compliance with the Sustainable Sourcing Code. The Commission has not been able to fully verify sound assurance processes within LOCOG for the use of hydrofluorocarbons in cooling and refrigeration, to ensure that the Sustainable Sourcing Code will be complied with. This has raised concerns around the application of LOCOG's assurance processes for other aspects of the Sustainable Sourcing Code such as timber and PVC;

<sup>87</sup> LOCOG (2012) Pre-Games Sustainability Report.

<sup>88</sup> ISO press release 20/6/12, <http://www.iso.org/iso/news.htm?refid=Ref1598>

<sup>89</sup> LOCOG (2012) Pre-Games Sustainability Report.

<sup>90</sup> LOCOG (2012) Pre-Games Sustainability Report.

<sup>91</sup> Commission for a Sustainable London 2012, Preparations Review (February 2012).

It was confirmed that LOCOG would not meet its target to have 20 per cent renewable electricity at Games-time. CSL accepted that it was not practicable to achieve this but acknowledged that LOCOG would be aiming meet at least the equivalent carbon reduction through a detailed energy conservation plan.. The report notes LOCOG are working on several measures to reduce energy use but have not yet seen the detailed calculations that will enable CSL to give assurance that they will meet or exceed the target. The LOCOG Pre-Games Sustainability Report states that the energy conservation plan would be ready for implementation as venues went live during the spring and summer. According to LOCOG, *"the development of this plan followed the summer test events and revisions to scope of power requirements, especially for technology and broadcasting. This now enables us to identify specific opportunities for energy saving measures across all venues. The focus of new measures is expected to be on operational protocols and ensuring these are communicated, implemented and reported through energy management procedures and workforce training."* However in its review of preparations CSL re-iterated its 2010 Annual Review recommendation *"That LOCOG calculates the carbon that would have been saved through the renewable energy target and demonstrates how this carbon will be saved through reducing Games time energy use."*<sup>92</sup>

#### Wider Impacts

The 2012 CSL Annual Review provides some early evidence on the wider impacts of the sustainability lessons from the preparation and delivery of the Games.

The impact on the property sector of building a 2,800 home development to Code for Sustainable Homes Level 4 has yet to be seen but it is anticipated that the skills and techniques learned will have a wide ranging impact on the construction industry. The Olympic Village project management partner is planning an exemplar sustainable development in Sydney (the Barangaroo project) based on learning from London 2012. The project has set challenging targets to be carbon neutral, water positive, zero waste and committing to high levels of Aboriginal employment. All of these aspects have been developed in the Olympic Village.

The 2012 Annual Report acknowledges early evidence of LOCOG's influence on the event management industry, with events such as the America's Cup sailing event in California and the golf Ryder Cup closely observing and replicating the best practices instigated by LOCOG.

CSL welcomes the ODA's publication of its learning legacy website in 2011 and the efforts of organisations such as the UK Green Building Council and the Institution of Civil Engineers to disseminate the learning. CSL also welcomes the work by Government to establish key principles for future projects based on the ODA's work and the work by projects such as Crossrail to adapt the ODA objectives to another major project for London. LOCOG has also stated that learning legacy case studies will be developed for every corporate sustainability objective (at least one for each objective).<sup>93</sup>

The report expresses concern that there has yet to be a comprehensive roll-out in Government, either in London or nationally. However in September 2012 the Government announced that the Learning Legacy website will continue under the auspices of the Major Projects Authority (MPA), a partnership of the Cabinet Office, HM Treasury and other Departments with the aim of improving the delivery success rate of significant projects across central Government.

#### **(iv) Conclusions: Outcomes and additionality**

Overall, the review evidence indicates that the ODA has achieved its key targets for the sustainable construction of the Olympic Park venues and facilities. The CSL has highlighted a number of notable achievements in relation to carbon emissions and energy efficiency savings. The review evidence also indicates that LOCOG was on course to achieve many of the sustainability targets for staging the Games although CSL has highlighted some concerns in the area of renewable electricity. A full review of the sustainability outcomes of the staging the Games will be published by London 2012 in December 2012.

<sup>92</sup> Commission for a Sustainable London 2012, Preparations Review (February 2012).

<sup>93</sup> LOCOG (2012) Pre-Games Sustainability Report.



**(v) Progress in answering the research questions**

*To what extent was sustainability integrated into the planning, design and governance of the Games, and what were the practical benefits of this?*

CSL has consistently commended the integration of sustainability into the planning, design and governance of the Olympic Park through a series of reviews. The overall sustainability agenda continues to be led by the London 2012 Sustainability Group which has played an important role in ensuring that the principles of sustainability are captured through the ODA's Learning Legacy activities.

*To what extent were the Olympic venues and Village designed and constructed in the most sustainable way, and what were the benefits of this?*

CSL has indicated that almost all the commitments in the ODA's Sustainable Development Strategy have been achieved or exceeded, or are on target to do so where work continues. Notable achievements include the project achieving well over the 90% waste targets, the Velodrome being over 30% more energy efficient than 2006 building regulations and reducing potable water demand by 75%, the stadium having over 30% recycled content and the aquatic centre reducing potable water demand by over 30% through reuse of filter backwashing water for non-potable requirements. As well as the potential impacts on industry approaches, some processes such as the reduction of potable water demand will lead to long-run cost savings for the Park in legacy.

*To what extent did the Games involve sustainable procurement practices, and what were the benefits?*

CSL reviews have generally been very positive in their reporting of LOCOG's sustainable procurement practices. CSL particularly welcomes LOCOG's BS 8901 certification, the British Standard specification for a sustainability management system for events, and has highlighted good practice in the organisation's sourcing approach.

*To what extent did the staging of the Games embody principles of sustainability, and what were the benefits of this?*

It is too early to fully address this research question. It was confirmed in April 2011 that LOCOG would not meet its target to have 20% renewable electricity at Games-time. CSL accepted that it was not practicable to achieve this but acknowledged that LOCOG would meet at least the equivalent carbon reduction through a reduction in energy use. The report notes LOCOG were working on several measures to reduce energy use but CSL had not yet seen the detailed programme approach that would enable them to give assurance that they would meet or exceed the target.

*To what extent did this influence and benefit the wider construction sector, public and private sector procurement, and the staging of events more generally?*

The 2012 CSL Annual Review provides some early evidence on the wider impacts of the sustainability lessons from the preparation and delivery of the Games. CSL welcomes the ODA's publication of its learning legacy website in 2011 and the efforts of organisations such as the UK Green Building Council and the Institution of Civil Engineers to disseminate the learning. However there is some concern that there has yet to be a comprehensive roll-out of lessons in Government, either in London or nationally. The CSL Making a Difference report expected to be completed in early 2013 will assess the extent to which new standards of sustainability arising from London 2012 are beginning to be adopted by wider industries.

## 4.9 Opportunities for disabled people in business & disabled access to transport

There is no evidence available yet on the opportunities provided by the Games for disabled people in business. As noted above, this will be addressed in the final evaluation of CompeteFor. Section 4.7 highlights some notable achievements in the area of employability for disabled people.

The GLA, TfL and ODA have taken forward accessible transport improvements linked to the Games. Overall, more than £6.5 billion has been invested to improve the transport network and ensure the smooth running of the Games.<sup>94</sup> As described in Report 3, some improvements were planned anyway and have been accelerated or enhanced due to the Games (for example improvements to Stratford station) and some would not have happened without the Games (for example Southfields station improvements).

In terms of London's tube network there has been a continued programme of tube station upgrades (for example 250 wider aisle gates have been installed). Approaching a quarter, 24%, of tube stations have step free routes. There is now step free access in Green Park station, completed in 2011, and in Kings Cross and Southfields stations (which are all key stations for the Games). Improvements to Southfields station took place due to the Games and its need to serve the tennis venue at Wimbledon. According to the latest statistics, 78 station improvements will be complete by the Games. In addition, on the Docklands Light Railway (DLR) the line's capacity has been increased and new rail cars have been provided.<sup>95</sup>

Though all buses have been accessible since 2005 the proportion of accessible bus stops has now more than doubled since 2008 to more than 60% (this figure is up from 50% from data reported in our Report 3).<sup>96</sup>

On the rail network in London, 38% of all London's rail stations have step-free routes (and according to latest data this will be 42% by end of 2012. Additionally, there has been investment in train improvements and new trains since Report 3.<sup>97</sup>

New travel information tools have been established (eg films to show how disabled access ramps work). The new travel mentoring scheme has proved popular, enabling disabled people to make 9,000 journeys a year with a 'buddy' or mentor to help them get familiar with their route enabling them eventually to travel independently.

<sup>94</sup> Data from Greater London Assembly (March 2012) Leaving a transport legacy. Olympic and Paralympic Transport Legacy Action Plan.

<sup>95</sup> Data from Greater London Assembly (March 2012) Leaving a transport legacy. Olympic and Paralympic Transport Legacy Action Plan.

<sup>96</sup> Data extracted from Transport for London (March 2012) 'Taking forward the Mayor's transport strategy accessibility implementation plan'.

<sup>97</sup> Data from Greater London Assembly (March 2012) Leaving a transport legacy. Olympic and Paralympic Transport Legacy Action Plan.

## 4.10 Summary research question

***What have been the economic impacts of the Games, particularly in terms of employment and GVA?***

The economic impacts of the Games are occurring through two broad mechanisms. The first relates to the direct demand side effects on expenditure flows. Patterns of spend directly related to the preparation and staging of the Games can be derived from the management information systems of the ODA and LOCOG. The second mechanism relates to the ongoing impacts associated with legacy interventions and other indirect effects where supplementary analysis is required to generate outcome estimates.

Using a modelling approach it is estimated that ODA spend could have resulted in gross impacts of £8.2 billion of GVA (£2008 prices) and approximately 175,000 job years of employment in the UK over the period from 2007 to the end of Q1 2012. This gross impact is based on £6.5 billion of spending by ODA during this period.

Applying our displacement assumptions, our net UK GDP impacts are 88% of the level of the gross impacts above. The net GVA impact is estimated at £7.3 billion (£2008 prices) and the number of job years falls by just over 10% to 158,600.

**Figure 4-32: 'Net' regional GVA and employment impacts of ODA spend (2008 prices)**

	Total Output (£m)	Total GVA (£m)	Total Job Years of Employment	Total Earnings (£m)
<b>London</b>	5,120	2,800	39,500	1,170
<b>South East</b>	2,270	1,050	24,990	580
<b>East of England</b>	2,100	950	23,250	520
<b>West Midlands</b>	1,270	580	16,610	320
<b>East Midlands</b>	820	380	11,040	210
<b>North West</b>	870	370	9,810	200
<b>Yorkshire and the Humber</b>	620	280	7,820	150
<b>Scotland</b>	590	290	7,310	150
<b>South West</b>	570	270	8,200	140
<b>North East</b>	250	120	2,990	60
<b>Wales</b>	240	110	4,390	70
<b>Northern Ireland</b>	190	80	2,710	50
<b>Total</b>	14,910	7,280	158,620	3,620

*Source: Oxford Economics.*

The economic modelling planned for Report 5 should benefit from more accurate displacements assumptions arising from the various on-going evaluations and studies.

The London, South East and East of England regions have enjoyed the bulk of economic benefits of ODA spend in terms of GVA and employment. However some significant benefits are estimated in regions further afield while other regions and nations have benefitted substantially from impacts through the supply chain. Interim evaluation evidence indicates that there has been a good geographical spread of businesses registered on CompeteFor, the portal which was established to ensure equal access to information on Games opportunities.

There is limited evidence to date of the ongoing economic impacts of the Games. The LDA's evaluation of LEST, the key Games-related employability and skills initiative in London, estimates that the programme generated net GVA of £219 million up to the end of 2010/11 by enabling job vacancies to be filled. According to recent research for London and Partners, the net tourism gain to the UK economy of the Games could be up to £1.24 billion (at 2011 prices) for the period 2007-2017.

## 4.11 Progress and next steps

The table below highlights evidence which should be available for Report 5 and highlights possible/ proposed approaches to addressing any likely evidence gaps.

**Figure 4-33: Evidence for Report 5**

<b>Evidence expected to emerge for Report 5</b>
Final Evaluation of CompeteFor including data on the impacts of Games contracts on longer-term outcomes
Evaluation of UKTI Games inward Investment programme
Evaluation of UKTI Games exporting programme
IPS, GBTS and Day Visits survey data on Games-time visitor numbers and attendance at Games and Cultural Olympiad events
Meta-evaluation survey on economic impacts and perceptions of UK as place to visit
Evaluations of key tourism campaigns – You're Invited, GREAT, Limited Edition London, Holidays at Home
Additional case studies of SSC employability and skills projects
CSL post-Games report on sustainability outcomes of staging Games
CSL 'Making a Difference' report on wider sustainability impacts
<b>Possible/ Proposed approaches to addressing the evidence gap in Report 5</b>
Additional questions in business surveys (eg FSB) on Games impacts
Survey of inward investment projects to examine Games influence

## 5 Promoting community engagement & participation

### 5.1 Introduction

The aim of this theme of the Games' legacy is to promote community engagement and participation in community-based activity, including voluntary work. The Beyond 2012 report<sup>98</sup> sets out the challenge as being to help reconnect communities, encourage a new culture of volunteering and to spread the benefits of the Games across the whole of the UK. There is also an ambition to create new opportunities for disabled people and to make the most of the potential of the Games to drive social change. The intention is that this engagement and activity will lead to more cohesive and proactive communities.

This chapter sets out the interim evaluation of activity related to the community engagement and participation legacy theme. As with previous meta-evaluation reports the evidence is presented according to the following sub-themes of activity:

- Volunteering and social action;
- Participation in culture;
- Engaging children and young people;
- Encouraging sustainable living;
- Influencing attitudes towards disabled people.

The interim evaluation is based upon a review of available monitoring data and evaluation findings for activity related to this theme supplemented by qualitative evidence and updates collected through consultations with key stakeholders. It should be noted that evaluation evidence related to this theme is limited at this stage as a significant proportion of activity was focused around Games-time and a number of key pieces of work are scheduled to report later in the year.

### 5.2 Volunteering and social action

Encouraging and enabling people to play a more active part in society are key objectives of this legacy strand. Activity in this sub-theme is concerned with increasing opportunities for volunteering and encouraging social action in order to bring direct benefits to people and communities.

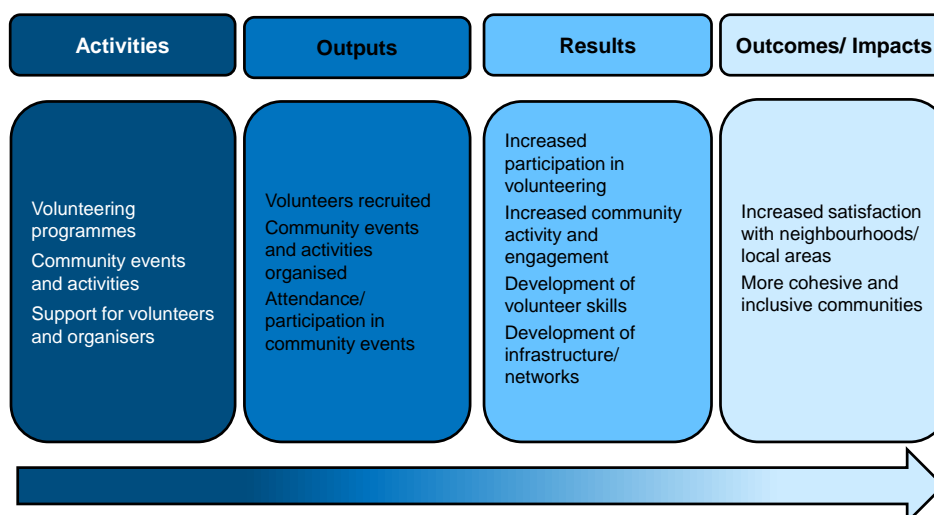
Our baseline analysis shows that participation in volunteering has undergone a small decline year on year since peaking in 2005.<sup>99</sup> In the absence of the Games, this trend would have been expected to continue; however, it is hoped that efforts to use the Games as a means to inspire volunteering and social action will generate an increase in volunteering behaviour.

Although some activity related to this theme had already taken place prior to the Olympic Games Opening Ceremony, the Games-time period brought an increased intensity of activity, including Games-related volunteering opportunities and numerous community events. The full impact of this sub-theme will therefore not be apparent at this stage. The following logic model summarises the theory of change for this sub-theme, based on that originally developed as part of our scoping report<sup>100</sup> and focusing on those areas where most evidence is available at this interim stage.

<sup>98</sup> Beyond 2012 – the London 2012 Legacy Story (DCMS, March 2012).

<sup>99</sup> Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 3 – Baseline and Counterfactual (Grant Thornton et al, 2012).

<sup>100</sup> Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 1 - Scope, Research Questions and Data Strategy (Grant Thornton et al, 2011).

**Figure 5-1: Volunteering and social action summary logic model****(i) Legacy programmes and initiatives**

Activity in this sub-theme is centred on three major initiatives:

- Games Maker - the London 2012 volunteer programme: which involved recruitment and training of up to 70,000 individuals to support the running of the Games by fulfilling a wide variety of roles across the venues, from welcoming visitors to transporting athletes to helping out behind the scenes;
- The London 2012 Inspire Mark: which provided recognition for non-commercial projects across the UK which were inspired by the Games. Successful applicants covered a range of themes, including volunteering, and helped to promote community engagement more generally;
- Olympic and Paralympic Torch Relays: the Olympic Flame arrived in the UK on 18<sup>th</sup> May, signalling the start of the 70 day Olympic Torch Relay which travelled to within an hour of 95% of people in the UK and culminated in the lighting of the Cauldron in the Olympic Stadium at the Opening Ceremony to mark the start of the Games. The Paralympic Torch Relay began on 22<sup>nd</sup> August with the creation of flames in the four home nations which, following a series of celebration events, were then combined at a flame lighting ceremony on 28<sup>th</sup> August in Stoke Mandeville. This was followed by a 24 hour torch relay ending in London at the Paralympic Games Opening Ceremony.

In addition to Games Maker, a number of other Games-related volunteer programmes were delivered. For example, the London Ambassadors programme recruited and trained a team of volunteers to provide information about the city to visitors in the period from July to September 2012. Ambassadors were based at 35 sites which were expected to attract significant numbers of visitors (including tourist attractions, transport stations and big screens showing Games events). Many local authorities around the country also recruited volunteers to support Games-related activity, including the host boroughs and others which were home to Olympic and Paralympic venues, such as the Newcastle Ambassadors scheme described in the box below.

### **Box 5-1: Newcastle Ambassadors**

Newcastle City Council implemented a Newcastle Ambassadors scheme with the support of Volunteer Centre Newcastle. Ambassadors from Newcastle, the wider region and countries including Ukraine, China, Japan and Spain were based throughout the City supporting visitors to the 2012 football competition and other Olympic related activities. 800 people expressed an interest in being an Ambassador with 350 people aged 18 to 70 accepted onto the programme and successfully completing a City and Guilds Qualification with Newcastle College.

During the 2012 football competition at St. James' Park match days saw on average 16 Ambassador Teams deployed involving 200 ambassadors and assisting with tasks as varied as bag divest, visitor information and ticket collection. Thanks to the Ambassador programme, the City has a cohort of volunteers to assist with future events.

In order to support volunteering more generally in the run up to the Games, the Office for the Third Sector (OTS)<sup>101</sup> funded development of infrastructure to promote volunteering and assist people to find opportunities more quickly and easily. This work was funded between 2009 and 2011 and delivered by YouthNet and Volunteering England and included work to upgrade the existing Do It website, undertake sector-focused education and outreach, and identify channels to allow further syndication of opportunities. OTS also provided funding to vInspired to support a Games-related strand of the vInspired Cashpoint (a fund which provides funding for young people to run their own volunteering project) and the mygames programme, which recruited young people as mygames Ambassadors to lead the delivery of sport events in their community.

More recently, the Office for Civil Society (OCS) provided funding to support the launch of the Join In initiative. Join In Local Sport took place on the weekend of 18<sup>th</sup> and 19<sup>th</sup> August 2012 (in the period between the Olympic and Paralympic Games) with the aim of encouraging clubs and community groups to host an event during that weekend as a way to attract new members and supporters.

OCS also supported activity to promote volunteering through the Social Action Fund including two Games-related projects which were approved in late 2011:

- StreetGames UK's project to scale up the existing StreetGames volunteering project, to bring it to 100 new deprived communities across England, and leave a legacy inspired by the Games. Many of the volunteering opportunities on offer were expected to be in the Olympic Park and also support local authority sports delivery;
- County Sports Partnership Network's project to create a nationwide Community Games involving 2 million people, 58,000 volunteers and 2,750 community events which would be run by the communities themselves and allow participation in cultural and physical activities.

#### **(ii) Evidence available: Outputs & expenditure**

General recruitment for Games Makers began in September 2010 and attracted more than 240,000 applications. In the region of 90,000 people were interviewed at selection centres across the UK to meet the demand.

Successful applicants were provided with at least three training sessions to prepare them for their roles. Many also took part in the London Prepares series test events<sup>102</sup> in order to gain valuable experience. In addition, over 2,000 16-18 year olds were selected to volunteer through the Young Games Maker programme. Similarly, recruitment and training of volunteers took place to support other Games-time programmes, for example, in summer 2011, recruitment events were held at 10 centres across London and over 12,000 potential candidates were interviewed in order to select the 8,000 London Ambassadors which were deployed across the city during Games-time.

<sup>101</sup> The predecessor of the now Office for Civil Society.

<sup>102</sup> The London Prepares series helped to test vital areas of operation prior to the London 2012 Games.

In the run up to the Games, volunteers were also involved in a variety of projects across the country. For example a total of 117 volunteers were recruited for the Great East Swim event in 2010 (an increase of 98% in the number recruited the previous year) and 113 volunteers were engaged in the delivery of events relating to the Tour of Britain Suffolk Community Events Programme in September 2011. The Medal Makers project involved recruitment of a pool of over 630 volunteers to support the preparation camps for teams for Great Britain and Japan at Loughborough University.

The two tables which follow show the level of public expenditure and outputs resulting from other key interventions under this sub-theme. In particular:

- DCMS committed a total of £1.6 million of funding to the Inspire programme.<sup>103</sup> Of the 2,713 projects which successfully applied for the Inspire Mark, 178 were specifically funded under the volunteering theme although a survey of Inspire project leads (see iv) suggested that a much higher proportion of projects encouraged and promoted volunteering, and the vast majority promoted community engagement at some level;
- As a result of the Inspiration and Legacy project over 800 organisations attended one of the 33 Games-inspired workshops held across the country and 184 organisations acted as project champions. Between June 2010 and March 2011, the Inspiration and Legacy pages on Volunteering England's website received 14,493 unique hits (which significantly exceeded the target of 1,500 hits per quarter). During the same period 745 document downloads took place. YouthNet also worked with LOCOG, as part of the Volunteer Advisory Group, to promote wider volunteering opportunities to those interested in the Games Maker programme;
- Work by vInspired created a significant number of volunteering opportunities for young people, including the recruitment of mygames Ambassadors to plan and coordinate delivery of a sporting event in their local community.

**Figure 5-2: Public expenditure on increasing community engagement and volunteering**

Legacy programme/ initiative	Funder	Budget (£m)	Actual (£m)	Time period
Inspire Programme	DCMS	£1.6m	£1.6m	2009-12
Inspiration and Legacy Project	Office for Third Sector	£1.6m	£1.6m	2009-2011
Join In	Office for Civil Society	£3m	n/a	2012-2014
Social Action Fund	Office for Civil Society	£2.75m – Round 1 projects	n/a	2012-2013
vInspired (inc. my games and vcashpoint)	Office for Third Sector	£5m	£5m	2009-2011

<sup>103</sup> Source: Assuring a legacy – promises, progress and potential (Commission for a Sustainable London 2012, March 2012).



**Figure 5-3: Participation outputs achieved – community engagement and volunteering**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Number	Time period
Inspire Programme	LOCOG	Projects receiving Inspire Mark	2,713	2010-2012
Inspiration and Legacy from the 2012 Games	YouthNet	New organisations signed up	559	April 2009-March 2011
		New Games-inspired opportunities made available	21,440	
		People registered for Games-related volunteering opportunities	8,078	
My Games	vInspired	Projects funded	100	2009-11
		Volunteering opportunities provided	827	
Vcashpoint	vInspired	Projects funded	19	2009-11
		Volunteering opportunities provided	10,247	

Cadbury (the Official Treat Provider of the Games) delivered the Spots v Stripes Community Programme with the help of Groundwork. The programme aimed to use game playing to bring people together and build stronger communities and involved establishing a network of Spots v Stripes Community Games Coordinators across the UK and Ireland. To the end of December 2011 over 120,000 people had been involved in playing at almost 1,900 Spots v Stripes events and almost 3,000 volunteers had been recruited and just over 1,000 community groups engaged.<sup>104</sup> These outputs are summarised in the following table.

**Figure 5-4: Participation outputs achieved – Spots v Stripes**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Number (target 2010-2012)	Time period
Spots v Stripes	Cadbury/Groundwork	People playing	121,107 (75,000)	2010-2011
		Events	1,882 (2,000)	
		Volunteers recruited	2,923 (2,000)	
		People reached	906,022 (500,000)	
		Improved open spaces near to Cadbury sites	7 (5)	
		Community groups engaged	1,002 (hundreds)	

### (iii) Evidence available: Evaluation and research

It is important to note that some of the key interventions in this sub-theme have yet to be evaluated; however, some initial evidence of the impact of the Games on volunteering and social action is available. For example, in 2010, a survey of people registered on the Do-it website, which was conducted by Youthnet, found that 715 respondents (28%) said that they

<sup>104</sup> Cadbury Sports V Stripes Community Impact Report 2011.

had been inspired by the 2012 Games to volunteer. Of those, 73% had never volunteered before (37%) or have only volunteered once or twice (36%), exceeding the target which had been set (70%) as part of the Inspiration and Legacy project.

As part of the Olympic Torch Relay, 8,000 inspirational people were nominated to act as Torchbearers and carried the flame through more than 1,000 cities, towns and villages. An estimated 15 million people came out to see the Flame as it travelled across the country, helping to bring together and inspire communities, this included 4.2 million people in London. In addition, in some areas local businesses benefited from the spending of those who came to view the Flame and media coverage helped to showcase and increase the profile of the areas which it passed through. The box below provides some examples which help to illustrate the success of the Torch Relay across the nations and regions. Spectator figures were collated by the Government Olympic Executive from the designated lead authority for each day of the Torch Relay.

**Box 5-2: The Torch Relay across the nations and regions**

- South West of England: it is estimated that over 750,000 spectators saw the Flame pass through the region. In some areas local businesses reported very busy trading conditions, and in Cornwall alone it is estimated that the relay generated an increase in consumer spending of almost £3.8 million across the 21 communities on the route.
- Wales: approximately 720,000 people saw the Torch pass through Wales over 5 days as it was carried by 500 runners along more than 300 streets. Evening celebrations took place in Cardiff, Swansea, Aberystwyth and Bangor.
- Northern Ireland: an estimated 300,000 people lined the streets as the Flame travelled through Northern Ireland. Councils expressed positive feedback from local traders, such as the main shopping centre in Coleraine recording an increase in footfall of 3,500 people on the day the torch passed through. The torch also toured several locations in Dublin, culminating in a public celebration in St Stephen's Green.
- Scotland: approximately 430,000 people saw the Torch Relay in Scotland with evening celebrations in Glasgow, Inverness, Aberdeen, Dundee and Edinburgh. The Relay offered the opportunity to build community engagement towards the Olympic football matches and 2014 Commonwealth Games in Glasgow.
- North East of England: an estimated 430,000 people came out to see the Torch Relay which showcased some of the region's most iconic attractions. The Newcastle Gateshead Initiative estimated that over 100,000 people were on the streets of Newcastle as the Torch passed through with a value to the local economy of £1.8 million.
- Yorkshire and Humber: approximately 1.16 million people gathered to watch the Torch Relay. The economic value to the city of York of the increased activity generated by the relay was estimated at £1 million.
- North West of England: the relay included seven evening celebration events and provided a way to showcase a number of Inspire marked projects in the region, including Balloons and Everyday Champions. An estimated 1.27 million spectators were attracted across the region in total. Based on evidence from comparable events, it is estimated that in Liverpool the relay generated £2.15 million of spending which would not have occurred otherwise.
- West Midlands: the Torch Relay generated around £3.5 million of economic activity in the region. Over 1 million people saw the Torch pass through the West Midlands accompanied by a cultural programme that highlighted local cultural content.
- East Midlands: approximately 1.15 million people viewed the Torch across the region. The cultural community fully engaged through commissions to provide the local content for evening celebrations, animating the route with dance and music and a specially commissioned carnival parade, Follow the Light.
- East of England: an estimated 1.4 million spectators saw the Flame, approximately 1 in 5 of the population of the region. The largest evening celebration came in Cambridge where the Torch joined the annual Big Weekend festival to light a cauldron in front of 40,000 people.
- South East of England: over 2 million people came out to see the Torch in the region. A number of areas worked with Tourism South East to use the Torch Relay to raise their profile, attracting foreign journalists and securing international media coverage.
- London: the Torch Relay ended in London where an estimated 4.2 million people saw the Flame. Evening celebrations took place at Chestnuts Field, Danson Park, Tooting Common, Walpole Park, Alexandra Park and Hyde Park before being delivered into the Olympic Stadium during the Opening Ceremony.

In the Paralympic Torch Relay, 580 Torchbearers (working in teams of five people) carried the Flame as part of the 24 hour journey from Stoke Mandeville to the Olympic Stadium after 40 Torchbearers had taken part in the three Flame Festivals and the Paralympic Flame Lighting Ceremony. An estimated 223,000 people attended the events and gathered along the route to

support the Torchbearers<sup>105</sup> further illustrating the extremely high level of interest and enthusiasm for the Games amongst the general public.

Evidence of success in encouraging community involvement more widely is provided by wave one of an online survey was distributed to all Inspire project leads in February 2012.<sup>106</sup> The key findings from wave 1 can be summarised as:

- The majority of respondents (79%) reported that their project was still in progress. The majority of projects had run/been running for more than one year at the time of the survey (54%), although some were much more newly established (for example 9% had been running for less than one month);
- Projects were most likely to fall under the sport strand (38%) while truce<sup>107</sup> was the least well-represented theme (1%) (see Figure 5-5);
- London and the South East (14% and 13% respectively) were the areas in which respondents' projects were most likely to primarily operate in, followed by the East Midlands (10%), although survey responses captured activity in all nations and regions;<sup>108</sup>
- The majority of respondents noted that their project was comprised of a series of linked events (71%). Almost two-thirds (65%) of projects involved both participation in an activity/activities and attendance at an event/events;
- When asked to imagine what would have happened if London had not been chosen to host the Games, the majority of respondents noted that their project would either not have taken place (39% reported that it would definitely or probably not have taken place) or would have been changed in some way (33% reported that it would not have taken place with the same scale or profile and 22% stated that it would not have taken place in its current form) which implies a high level of additionality of activity associated with the programme;
- Respondents felt that the main benefit of being part of the Inspire programme was a greater profile for the project (84%) (see Figure 5-6). A large proportion of projects also reported that they had made links to other Games-related activity, most commonly the Cultural Olympiad (31%) and Torch Relay (30%) (see Figure 5-7);
- Overall, there was significant variability in the number of people reported as being involved in delivering projects. Summing across all respondents gave a total of almost 154,000 people having been involved in this way. A significant proportion of the people involved in delivering the projects were volunteers (70%). The estimated number of volunteers totalled approximately 112,000 across the sample (n=290);
- Estimates of participation in activity generated a total of 186,000 adults and approaching 613,000 children across the whole sample of respondents (n=290);<sup>109</sup>
- Respondents were also asked to rate the impact of their project in a number of areas. Significant positive impacts were perceived to have occurred in all areas, in particular provision of new skills, participants' involvement in their local community and encouraging volunteering (see Figure 5-8);

<sup>105</sup> Attendance at Flame Festivals and Celebrations is estimated to total 151,000 and 72,000 lined the route from Stoke Mandeville to London (including 66,000 in London).

<sup>106</sup> A total of 290 responses were received and a further wave of the survey will be undertaken post-Games in order to capture information from projects which had not commenced activity at the time of wave one. The datasets from the two waves will be combined and the resulting analysis included in Report 5.

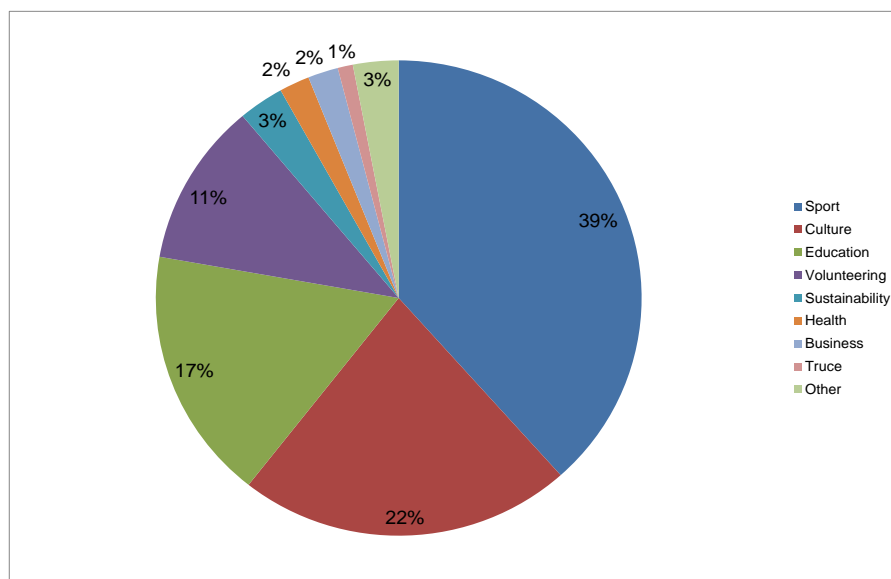
<sup>107</sup> The truce strand concerned projects which promote the principles of the Olympic Truce, for example by using sport or culture to promote peace, conflict resolution and/or cultural understanding.

<sup>108</sup> The proportion of survey respondents from London and the East Midlands is similar to the level in the overall population of Inspire Mark projects (based on LOCOG monitoring data) at 15% and 10% respectively. However, projects based in the South East were over-represented (making up 10% of the population compared to 13% of respondents) and the North West and South West were under-represented (with the North West making up 9% of survey responses compared to 12% of the population, and South West projects accounting for 4% of responses compared to a share of 10% of the population).

<sup>109</sup> For comparison, LOCOG estimate that overall over 10 million people in the UK have been involved in an Inspire project.

- Additional positive impacts included partnership working, engagement with local communities and increased awareness of a range of aspects including London 2012, Olympic and Paralympic values, different groups and cultures, and local facilities. A number of respondents mentioned increased confidence or self-esteem as an important benefit for participants and/or volunteers and a number of others noted benefits in terms of cohesion, integration or bringing different sections of the community together;
- Positively, over three-quarters of respondents (78%) reported that their project would continue following the Games and 93% stated that their project had inspired them to run similar projects in the future.

**Figure 5-5: Response to the question 'which one of the main strands does your project fall into?' (n=290)**



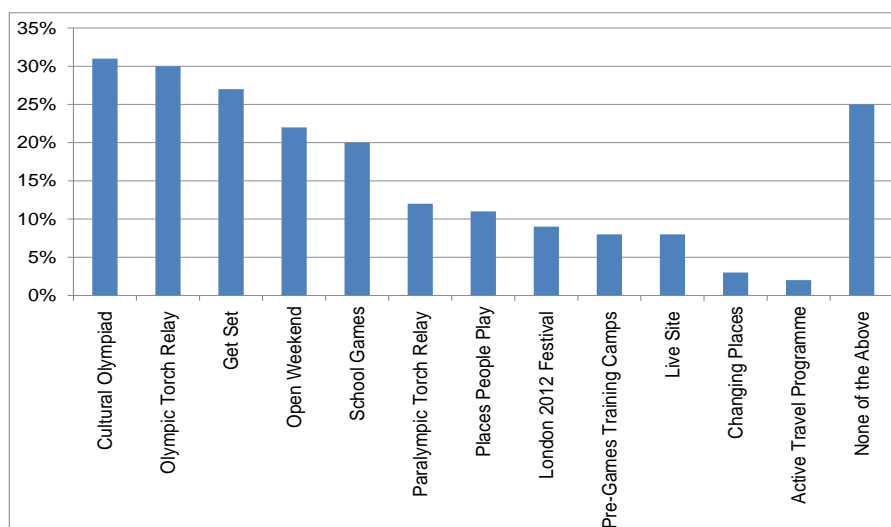
Source: Survey of Inspire Mark project leads, Nielsen/LOCOG (2012).

**Figure 5-6: Response to the question 'which, if any, of the following do you feel are benefits of being part of the London 2012 Inspire programme?' (multiple responses permitted; n=290)**

Benefits	Proportion of Sample
Greater profile of the project	84%
Helped engage more participants	53%
Increased the scope of the projects	52%
Helped engage more partners	48%
Provided links to other London 2012 opportunities	45%
Attracted new/different participants or audiences	45%
Attracted larger audiences	32%
Other	5%
None	4%

Source: Survey of Inspire Mark project leads, Nielsen/LOCOG (2012).

**Figure 5-7: Response to the question 'does your project link to or support any of the following Olympic or Paralympic related projects or activities?' (multiple responses permitted; n=290)**



Source: Survey of Inspire Mark project leads, Nielsen/LOCOG (2012).

**Figure 5-8: Response to the question 'please indicate how you would assess your project's impact in the following areas?' (n=290)**

	Very positive	Positive	No impact	Negative	Very negative
Participation in sport by adults	18%	33%	48%	0%	0%
Participation in sport by young people	36%	33%	31%	0%	0%
Engaging people in sport for the first time	29%	36%	35%	0%	0%
Sustaining people's engagement in sport beyond the life of the project	33%	39%	28%	0%	0%
The health and fitness of participants	35%	38%	27%	0%	0%
Increasing awareness and/or understanding of disability	22%	39%	38%	0%	0%
Participation in arts or cultural activities	30%	25%	44%	1%	0%
Engaging people in arts or cultural activities for the first time	27%	28%	44%	1%	0%
Encouraging volunteering	36%	41%	23%	0%	0%
Local business/the local economy	9%	39%	51%	0%	1%
Access to employment opportunities	13%	36%	51%	1%	0%
Provision of new skills	42%	46%	12%	0%	0%
Pride in the local area	29%	47%	23%	0%	0%
Regenerating the local area	12%	29%	59%	0%	0%
Participants' involvement in their local community	39%	44%	17%	0%	0%
Diverting young people from crime/staying out of trouble	19%	38%	42%	0%	0%
The wellbeing of local people	31%	48%	21%	0%	0%

Source: Survey of Inspire Mark project leads, Nielsen/LOCOG (2012).

In addition, an ongoing survey of participants in Inspire projects in the North West region had attracted over 500 responses prior to the Games. Key findings include:

- Around 87% of respondents had attended an Inspire project which involved participation in sport and physical activity;

- Respondents reported an increased frequency of involvement in sport and the arts since their participation in an Inspire project with 69% taking part in sport at least once a week prior to their involvement in Inspire rising to 79% after and the respective figures for arts and cultural activities being 27% and 35%;
- The survey asked about the impact on views and behaviour for a range of outcome measures. People were most likely to say that they had made friends whilst on the programme (a net effect of +74%), felt healthier and fitter (+68%), were more likely to get involved in their local community (+65%) and felt more self-confident (+65%);
- Respondents were also asked their opinion on the extent to which the Games will impact on a number of areas based on a scale from 1 (low) to 10 (high). The area where the programme was seen as having the highest potential impact is the ability of Paralympic sports to generate a more positive view of disabled people and their achievements (generating an average score of 8.49), followed by the extent to which the Games will lead to an increase in public pride (7.94).

Evaluation of the social impacts of the Cadbury Spots v Stripes Community Programme is underway and at the interim stage had involved surveys being completed by 44% of long term volunteers. An interim Social Return on Investment (from August 2010 to the end of November 2011) found that for every £1 invested in the Cadbury Spots v Stripes Community Programme, an estimated social value of £1.90 or £4.7 million had been created.<sup>110</sup>

The research also found that participants and spectators had met new people of different ages and backgrounds with 98% of volunteers and 86% of participants and spectators surveyed having met and spoken with people of different ages and over 75% having met and spoken with people of different cultures. There is also evidence that the programme had helped to build stronger and more cohesive communities as 83% of responding participants said they were now more likely to get involved in community activities, one in three were more likely to consider volunteering in the local area and 85% agreed that there was a greater sense of community in the area.

Volunteers reported that they had improved skills in the areas of: communication (86%), team working (87%) and organisational/time management (69%) as a result of taking part, and 81% stated their confidence and self-esteem had increased.

#### **(iv) Conclusions: Outcomes and additionality**

At present it is not possible to estimate the total number of volunteers in Games-related activity although the feasibility of generating such an estimate will be considered again in Report 5, following receipt of information on Games-time activity and the final wave of the Inspire project survey.

The latest data from the Taking Part survey (April 2011 to March 2012) shows that the proportion of adults who had volunteered in the last 12 months was 23.3%. This is not a significant change on 2010/11 suggesting that up to March 2012 the Games was yet to have a discernible effect on participation in volunteering in the general population.

However, the latest wave of the survey also found that 6% of adults reported that they had been motivated to do more voluntary work as a result of the UK winning the bid to host the 2012 Games. The greatest impact on motivation to volunteer is observed amongst young people (aged 16-24) with 14% of this group reporting that they had been motivated to do more voluntary work. The same survey reveals a strong effect on people from BME groups (21%). There are some regional differences with the highest proportion of people motivated to volunteer in London (12%)

<sup>110</sup> Cadbury Sports V Stripes Community Impact Report 2011.

One possible explanation for these findings is that so far the winning bid may have been more likely to encourage existing volunteers to increase their volunteering activity, rather than encouraging more people to participate. Another possible factor is that the motivation is to volunteer during the Games and so has not yet been captured by the Taking Part volunteering data.

**(v) Progress in answering the research questions**

*To what extent and how have the 2012 Games resulted in more active, cohesive and successful communities, including through:*

- *Inspiring more organisations to offer volunteering opportunities and building the capacity of the sector?*
- *Inspiring more people (and especially young people and disabled people) to volunteer their time, and tackling the barriers to participation?*
- *Inspiring people to set up their own 2012 Games-related activities, which engage people across the UK in the Games?*

Interim findings from surveys of Inspire project leads and the Spots v Stripes evaluation provide some evidence of Games-related activity having had a positive effect on community engagement and cohesion. For example, across the survey sample of 290 Inspire Mark projects the estimated number of volunteers exceeded 100,000 and at the interim evaluation stage over 2,900 volunteers had been recruited to support Spots v Stripes activity. In addition, both the survey of Inspire project leads and research undertaken as part of the Spots v Stripes evaluation provide evidence of a perceived increase in community engagement/involvement more generally. However, a more extensive evidence base will begin to emerge later in 2012, including findings from a survey of Games Makers (which will provide important evidence related to the motivations and experience of volunteers, including disabled people) and wave 2 of the Inspire project leads research.



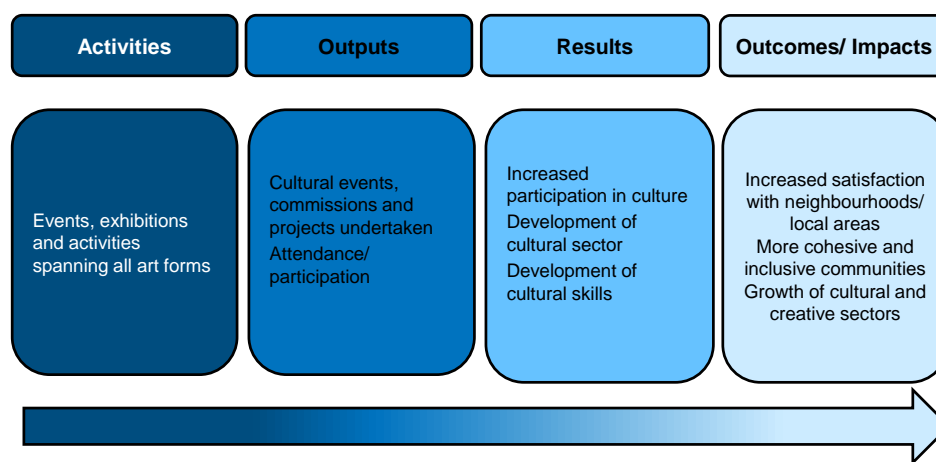
### 5.3 Participation in culture

Engaging and inspiring the next generation of performers and audiences is a key legacy objective to be met by providing an opportunity for everyone to celebrate the 2012 Games. It is also intended that this activity will leave a lasting legacy for culture and the arts across the UK.

Analysis of available data shows that levels of engagement with the arts, and culture more generally, in the adult population has remained unchanged in recent years prior to 2012<sup>111</sup> and in the absence of the Games it is expected that this trend would have continued. However, the extensive programme of cultural activity which accompanies the Games provides an opportunity to stimulate an increase in participation.

Activity took place across the UK in the period leading up to the Games which this report focuses on. Activity during the Games time period will be covered in Report 5. The following diagram illustrates the intervention logic for this sub-theme focused on those metrics for which evidence has already begun to emerge.

**Figure 5-9: Culture summary logic model**



#### (i) Legacy programmes and initiatives

The London 2012 Cultural Olympiad was a four year programme of activity comprised of a range of programmes and projects inspired by the Games and culminating in the London 2012 Festival where leading artists from all over the world came together to celebrate London 2012 and which ran from 21<sup>st</sup> June to 9<sup>th</sup> September 2012. Overall, the programme funded thousands of events and activities across the full range of art-forms, including for example:

- Stories of the World: a project which enabled young people to work with curators, filmmakers, artists, writers and musicians to explore and reinterpret museum collections and develop exhibitions and events at over 40 venues;
- New Music 20x12: brought 20 composers together with arts organisations to each create a 12 minute piece of music inspired by the 2012 Games;
- Open Weekend: a series of sporting, art and cultural activities which took place across the UK on a weekend in each of the four years prior to the Games;
- Film Nation - Shorts: a project which gave 14-25 year olds the chance to make films celebrating the values of the Olympic and Paralympic Games;
- Discovering Places: a campaign to inspire people in the UK to discover their local built, historic and natural environment;
- Artists Taking the Lead: 12 public art commissions, one in each nation and region of the UK, to help celebrate the 2012 Games;

<sup>111</sup> Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 3 – Baseline and Counterfactual (Grant Thornton et al, 2012).

- Unlimited: a series of major commissions celebrating arts, culture and sport by deaf and disabled people.

Thirteen Creative Programmers were appointed to support Games-related cultural activity and engagement with the Cultural Olympiad in each of the nations and regions (and two in London). Creative Programmers sat within a framework which also included a Nations and Regions Coordinator, who took the lead on Games-related engagement and coordination in the area, and an Inspire Programmer, who took responsibility for coordinating, promoting and delivering the Inspire Mark programme.

In addition, significant activity took place at local level for example the West Sussex Arts Partnership (a partnership between local authorities) managed the West Sussex - Ahead of the Game Cultural Programme, and worked in partnership with a range of organisations, including colleges, the university and schools. Some of the activities which formed part of the Cultural Olympiad also carried the London 2012 Inspire Mark. From 2008 to 2011, the Cultural Olympiad also encouraged organisations across the UK to join in the 'countdown' to the Games via the Open Weekend initiative.

### **Box 5-3: West Midlands Cultural Olympiad**

From 2008 to 2012 a programme of world-class performances, outdoor spectaculars and community events took place in the West Midlands as part of the Cultural Olympiad and London 2012 Festival. The programme involved:

- 964 projects
- Over 100,000 events and activities
- 78 world premieres and 10 UK premieres
- 800 new partnerships

There were over 2.7 million attendances at events and programmes, of which over 1 million were attendances by young people. Projects also attracted new audiences, with almost a third (29%) of Dancing for the Games participants having never participated in dance prior to engaging with the projects and 47% of World Shakespeare Festival ticket purchasers having never booked to see a show at the Royal Shakespeare Company in Stratford before. Feedback from participants around social impacts has been positive across projects, with 74% reporting they felt more confident and 70% reporting they had made new friends.

Using an on-line toolkit, economic impacts of the programme have been estimated:

- £27.4 million of net economic impact added to the West Midlands economy
- £80 million in gross economic activity (a combination of spend by audiences and organisations)
- 110 jobs created
- Investment by Legacy Trust UK, Arts Council England, Advantage West Midlands and LOCOG of £6.8 million brought a return on investment of £11.1 million.

*Source: [http://visitbirmingham.com/files/2012-09-39/35634Culturalolympics6pp.A4proof2LR\\_tcm33-41273.pdf](http://visitbirmingham.com/files/2012-09-39/35634Culturalolympics6pp.A4proof2LR_tcm33-41273.pdf)*

### **(ii) Evidence available: Outputs & expenditure**

Approximately £105 million of funding was made available for the Cultural Olympiad, with just over half of this sum (53%) allocated to the London 2012 Festival. This total included significant contributions from Arts Council England, Legacy Trust UK and Olympic Lottery Distributor (OLD). Co-funding was also provided by various partners (including corporate sponsorship from BP, BT and Panasonic) (see Figure 5-10).

**Figure 5-10: Cultural Olympiad funding<sup>112</sup>**

Funder	Festival (£m)	Non-festival (£m)	Total (£m)	Time period
Legacy Trust UK	3.9	29.1	32.9	2008-12
Arts Council	12.1	12.8	24.9	2008-12
OLD	14.0	2.7	16.6	2008-12
GLA (Look and Feel)	3.9	0	3.9	2008-12
DCMS	3.7	0.1	3.9	2008-12
LOCOG	5.0	5.1	10.0	2008-12
Co-funding	12.7	0.3	13.1	2008-12
Total <sup>113</sup>	55.3m	50.1m	105.3	2008-12

Overall, Legacy Trust UK had an available endowment of around £40 million<sup>114</sup> which was used to fund 16 programmes, four national<sup>115</sup> and 12 in the nations and regions<sup>116</sup> (see Figure 5-11). Taken together, these programmes amounted to over 100 arts, sports and education projects, taking place across the UK.

**Figure 5-11: Expenditure on Legacy Trust UK programmes**

Legacy programme/initiative	Lead Organisation	Budget (£m)	Actual (£m) (to March 2012)	Time period
Legacy Trust UK – nations and regions	Various	£24.1m	£19.0m	2008-12
Legacy Trust UK – national programmes	Various	£18.4m	£16.7m	2008-12

In addition to their contribution to Legacy Trust UK's endowment, the Arts Council invested resources in a number of other elements of the Cultural Olympiad, primarily Artists Taking the Lead, Unlimited and Stories of the World. The Arts Council also contributed to the cost of art at the Olympic Park and training for disabled artists to enable them to take part in ceremonies. In addition, the Arts Council currently provides funding for a range of organisations through its national portfolio funding programme (previously the regular funding programme) and it is anticipated that a number of these organisations will have used some of these funds to develop or contribute to Games-related projects. Steps have been taken to capture information on the extent of this activity through the annual review process. The following table summarises the Art Council's direct project funding for Cultural Olympiad, Inspire and London 2012 Festival Projects (but excludes any contributions made by the Arts Council's National Portfolio Organisations and Major Partner Museums from their core funding).

<sup>112</sup> Budget correct as of June 2012

<sup>113</sup> Excludes the ODA funding for Art in the Park (£33.7 million).

<sup>114</sup> The endowment was funded by the Big Lottery Fund (£29 million), Arts Council England (£5 million) and DCMS (£6 million). This is a total figure and so exceeds the £32.9 million allocated specifically to the Cultural Olympiad (as shown in Figure 5-9).

<sup>115</sup> The four national programmes were UK School Games 2008-11, Tate Movie, somewhere to and Community Celebrations.

<sup>116</sup> The 12 programmes in the nations and regions were Connections (Northern Ireland), The Scottish Project (Scotland), The Power of the Flame (Wales), Eastern Rising (East of England), Igniting Ambition (East Midlands), Big Dance (London), NE-Generation (North East), We Play (North West), Accentuate (South East), RELAYS (South West), Moving Together (West Midlands) and imove (Yorkshire and Humberside).

**Figure 5-12: Expenditure in the Cultural Olympiad by the Arts Council**

Legacy programme/ initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
Artists Taking the Lead Commissions	Various	-	£5.1m	2008-12
London 2012 Festival	Various	-	£11m	2008-12
Unlimited Commissions	Various	-	£2.3m	2008-12
Legacy Trust UK – national contribution	Legacy Trust UK	-	£5m	2008-12
Other Cultural Olympiad Projects	Various	-	£5m	2008-12
Inspire Mark Projects	Various	-	£8.7m	2008-12

Figure 5-13 summarises available output data for aspects of the Cultural Olympiad. In particular:

- In early 2012, it was estimated that there had been more than 16 million attendances across the UK at Cultural Olympiad events and over 169,000 attendances at around 8,300 workshops;<sup>117</sup>
- Between 2008 and early 2012, it was estimated that, in total, Legacy Trust UK projects had reached audiences of over 6.7 million and worked with over 47,000 volunteers. It was further estimated that funded projects had directly engaged with almost 550,000 children and young people (and in some cases projects had been led or developed by young people) and almost 45,000 disabled participants. The programme overall was noted by stakeholders for its support of outdoor arts and the use of non-traditional venues which had contributed to its success in engaging new audiences and participants. The majority of stakeholders agreed that programmes had sought to engage with those who do not usually attend cultural events.<sup>118</sup>

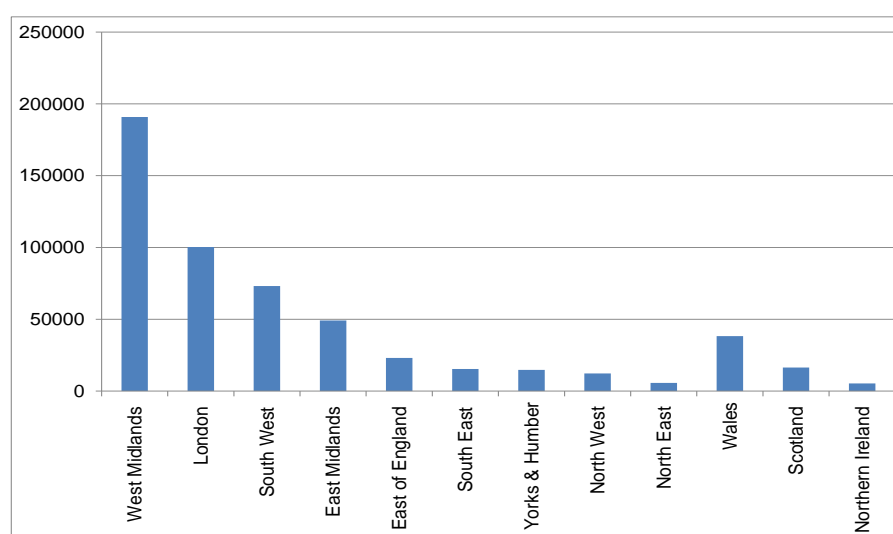
<sup>117</sup> <http://www.london2012.com/about-us/cultural-olympiad/index.html> (accessed 24/05/12)

<sup>118</sup> Legacy Trust UK Interim Review (2012).

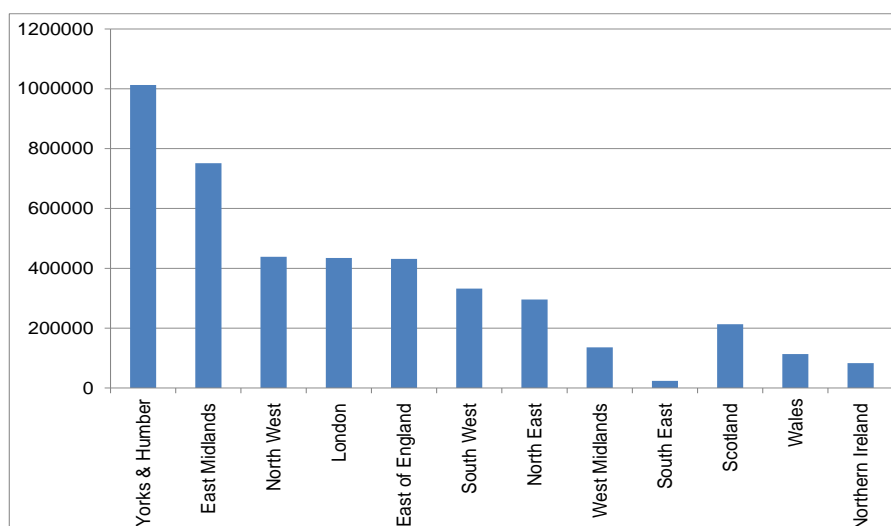
**Figure 5-13: Outputs achieved – Cultural Olympiad**

Legacy programme/ initiative	Lead Organisation	Outputs achieved	Number	Time period
Cultural Olympiad (pre-Festival)	LOCOG	Participants	>16m	2008-2012
		Workshop attendance	>169,000	2008-2012
Legacy Trust UK Programmes	Various	Participants	596,895	To end January 2012
		Audiences	6,738,647	
		Web audience	6,331,529	
		Volunteers	47,841	
		Children and young people engaged	549,189	
		First time volunteers	3,578	
		Volunteers moving into training or employment	207	
		Emerging artists worked with	5,324	
		New artistic partnerships	1,415	
		New productions/commissions	1,605	
		Disabled people engaged	44,417	
Economic impact generated	£42.9m			

Figure 5-14 and Figure 5-15 provide a breakdown of overall participants and audiences related to the 12 Legacy Trust UK programmes in each of the nations and regions. It should be noted that the programmes varied greatly between regions with some more focussed on mass participation events and some more focussed on smaller scale but deeper levels of engagement. This explains a lot of the variation in participation and audiences between regions. For example, the West Midlands Legacy Trust programme included a Community Games programme with over 400,000 participants and a scheme to engage people with dance, Dancing for the Games, which will reach over 470,000 people by the end of 2012.

**Figure 5-14: Overall participation in Legacy Trust UK programmes - nations and regions**

Source: Legacy Trust UK.

**Figure 5-15: Overall audiences in Legacy Trust UK programmes - nations and regions**

Source: Legacy Trust UK.

### (iii) Evidence available: Evaluation and research

#### Cultural Olympiad

Evaluation of the Cultural Olympiad as a whole is underway and will include the findings of an audience survey undertaken during the London 2012 Festival along with a project survey (completed by delivery partners), social media analysis, press media analysis and case studies (a number of these will focus on the issue of participation).

In order to provide some initial indications, Figure 5-16 sets out the audience survey findings from four Cultural Olympiad events which had taken place prior to the Games. The findings show that the vast majority of the spectators surveyed were aware that the event they attended was part of the Cultural Olympiad and most reported that they were more likely to attend other similar events in future. Where asked, the majority of respondents also agreed that events like the one they attended helped the local community come together, indicating a positive effect on community engagement and cohesion. In addition, 57% of respondents interviewed at the Big Concert agreed that the event had inspired them to get more involved in their local community.

**Figure 5-16: Cultural Olympiad Audience Survey – Emerging Findings<sup>119</sup>**

	Big Concert, Stirling (n=104)	Fire Garden, Stonehenge (n=85)	Globe to Globe (n=775)	BT River of Music (n=275)
Majority origin of spectators	Scotland – 96%	South West – 78%	London – 60%	London – 66%
Aware event was part of Cultural Olympiad	93%	78%	76%	89%
More likely to attend cultural event in future	68%	73%	56%	59%
Agree that such events help local community come together	92%	68%	n/a	54%

Source: Cultural Olympiad Audience Survey, Nielsen/LOCOG (2012)

<sup>119</sup> Surveys were administered face-to-face at Stirling and Stonehenge. Spectators at the other two events were contacted by email.

Legacy Trust UK programmes

All programmes funded by Legacy Trust UK are undertaking evaluations. These will be completed by the end of 2012. Some emerging findings are set out in the box below.

**Box 5-4: Legacy Trust UK evaluation findings**

**Accentuate**, the Legacy Trust UK programme for the South East of England, was comprised of 15 projects which promote the skills, talent and leadership of deaf and disabled people, using the inspiration of the Paralympic Games to have an impact across the cultural sector and beyond, and aimed to create a legacy of changed perceptions and access to opportunities.

The programme worked with cultural organisations to build their skills and awareness about disability and to create new employment and volunteering opportunities for disabled people. At the half-way stage the programme had worked with 654 cultural organisations (against a lifetime target of 1,364). The programme had also supported 469 disabled people to improve their skills and created over 20 best practice toolkits and guides about increasing access to culture for disabled people.

Accentuate also worked to improve infrastructure, including the accessibility and welcome for disabled people at six transport hubs and 20 visitor destinations.

**Igniting Ambition** was the East Midlands Legacy Trust UK programme. Creative Innovation was the business support strand of the programme and aimed at promoting and fostering innovation and creativity within the region's cultural sector. Creative Innovation was part-funded by the European Regional Development Fund (ERDF) and the programme's evaluation report for 2011 noted that it had already achieved 30 (of a target of 33) businesses engaged in new collaborations with the knowledge base. In addition, 88 businesses had been assisted to improve performance (80% of the target for the programme lifetime) and there was thought to be continuing high demand from across the creative and cultural sectors for the services provided.

**RELAYS** (Regional Educational Legacy in Arts and Youth Sport) was the Legacy Trust UK programme for the South West of England. Its aim was to inspire young people and their communities to participate in, create and promote cultural and sporting activities; engage the region with the London 2012 Games and create a lasting legacy beyond 2012. RELAYS focused on three main areas of engagement – sport, culture and business. The programme was delivered through 11 of the regions universities and several cultural organisations

RELAYS delivered a range of events including art workshops, school sports competitions, surf events, dance showcases, public festivals and running community classrooms. Over the last 4 years RELAYS has worked with nearly half a million people across the South West, holding over 1,600 events, attracting an audience of over 500,000, engaging with 96,000 young people and community members, providing over 7,200 volunteering opportunities and supporting over 1,800 businesses.

Inspire projects

Almost one-quarter (22%) of respondents to wave one of the survey of Inspire project leads (see Section 5.2) reported that their project came under the culture strand.

In the overall sample (n=290), 31% of respondents reported that their project had links to the Cultural Olympiad, while 22% reported links to Open Weekend and 9% to the London 2012 Festival. Project leads reported positive impacts on participants, with 55% reporting that their project had a positive or very positive impact on participation in arts or cultural activities.

Evidence of the beneficiary perspective is provided by a survey of participants in Inspire projects in the North West region. Interim findings show that 27% of respondents attended an event which involved arts and cultural activities.

Respondents also reported an increased frequency of involvement in the arts since their participation in an Inspire project with 27% taking part in arts and cultural activities at least once a week prior to their involvement in Inspire, rising to 35% afterwards.

Open Weekend

The Open Weekend programme was a curtain raiser to the annual countdown to the start of the Games, and took place from 2008 to 2011. LOCOG defined it as an opportunity for people across the UK to get involved in sport and cultural activities, and actively mark the countdown. Organisations were asked to give the public an opportunity to try something new or take their interest to the next level. The number of organisations registering to participate grew year on year (for example, there were over 24% more approved events and 28% more organisations in 2010 compared to 2009) and, by 2010, there was an estimated audience of 900,000 across the UK. The regions most active within the programme (between 2008 and 2010) were London, the East and the South East. Most activities presented had a sporting theme, followed by heritage and museums, then libraries and archives.

**(iv) Conclusions: Outcomes and additionality**

The latest findings from the Taking Part survey show an increase in the proportion of adults in England who have engaged with the arts in the last year (78.2% in 2011/12 compared to 76.2% in 2010/11). Furthermore, the latest findings also show an increase in the proportion reporting that they had visited a heritage site in the past year (74.3% in 2011/12 compared to 70.7% in 2010/11) and those that had visited a museum or gallery (48.9% in 2011/12 compared to 46.3% in 2010/11). These findings indicate an increase in cultural participation amongst the general population over the past year, although the extent to which the Games are responsible for this is not clear. However, in the same survey, 3.8% of those taking part in cultural activity reported that they were motivated to do more as a result of the UK hosting the 2012 Games, suggesting that the Games could be responsible for at least some of the observed increase in participation. This positive effect on motivation to take part in cultural activities was higher for some groups:

- Those participating in the 25-44 age group (5% reported that the Games had motivated them to do more cultural activities compared with 3.8% overall);
- Those participating from a BME groups (around 11.9%);
- Those participating from London (6.2%) and the West Midlands regions (5.9%).

A number of questions about cultural participation were included in the specially commissioned host boroughs resident survey (see Appendix C). This revealed that, in the last 12 months, 64% of respondents had done some form of cultural activity, 11% of whom said that the Games had motivated them to do more.

**(v) Progress in answering the research questions**

*To what extent have the 2012 Games resulted in more active, cohesive and successful communities through inspiring more people (and especially young people) to take part in cultural activities, and how?*

Data from Legacy Trust UK and the Inspire Survey show that projects under this theme have successfully attracted a significant number of participants/audience members which is indicative of a positive effect on community engagement. Also, findings from the first phase of the Inspire survey show that the majority of respondents feel that their project had a positive effect on participants' involvement in their local community (83% either strongly agree or agree that this is the case).

The latest data from the Taking Part survey shows an increase in the proportion of adults in England who have engaged with the arts in the last year (78.2% in 2011/12 compared to 76.2% in 2010/11), an increase which is particularly pronounced for young people (aged 16-24) (from 77.3% in 2010/11 to 82.6% in 2011/12), although the extent to which the Games is responsible for this increase in participation is not clear. The same survey shows that 5.7% of young people (16-24) who participated in cultural activities were motivated to participate in more by the Games.



***To what extent have the 2012 Games resulted in improved access to and participation in cultural activity amongst disabled people?***

It is too early to assess the extent to which activity under this sub-theme has improved access and participation for disabled people. There is some evidence from Legacy Trust UK which shows a significant number of disabled people have engaged with projects although it is not known to what extent they would already typically participate in cultural activity. The latest data from the Taking Part survey shows an increase in the proportion of those with a long-standing illness or disability who have engaged with the arts at least once in the last year (from 69.7% in 2010/11 to 71.8% in 2011/12), although this extent to which the Games is responsible for this increase in participation is not clear. The same survey shows that 3.1% of people with a long-standing illness or disability who had participated in cultural activities were motivated to participate more due to the Olympics. This figure is lower than for the population overall, although this difference may be due to sampling effects<sup>120</sup>. An in-depth assessment of the Unlimited programme is being undertaken as part of the Cultural Olympiad evaluation and should provide some insights in this area.

***To what extent has Cultural Olympiad activity resulted in wider economic benefits, including through skills development, enterprise support and attracting visitors to London and the UK?***

There is some evidence from Legacy Trust UK programmes which indicates a significant economic benefit associated with this activity (estimated at over £40 million) although it is not fully clear how these estimates were generated and they will be reviewed in more detail once evaluation work is completed.

<sup>120</sup> Significant at the 90% confidence level.

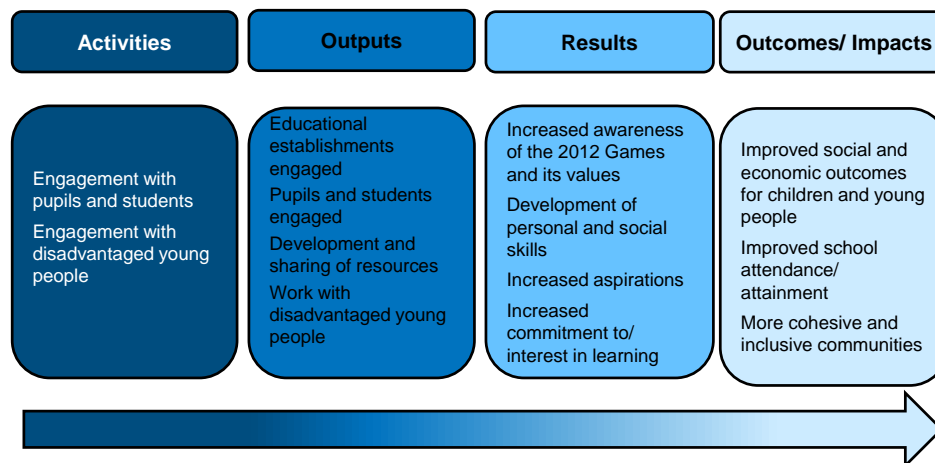
## 5.4 Engaging children and young people

This sub-theme is concerned with activity which uses the Games as a means to inspire and enhance the education of children and young people, and to promote social inclusion.

Educational attainment and attendance in schools has generally been improving across England in recent years. However, performance in the host boroughs has tended to lag behind the national average and it is hoped that the inspiring effect of the Games will help to facilitate improvement.

The potential outcomes related to this sub-theme are likely to be more long-term in nature and so not yet visible at this interim stage. However, this theory of change is set out in the following logic model for this sub-theme.

**Figure 5-17: Child and young people summary logic model**



### (i) Legacy programmes and initiatives

Get Set was the official London 2012 education programme, delivered by LOCOG. It was designed for schools and colleges across the UK and delivered through an online platform which provided a range of resources targeted at 3-19 year olds and aimed to enhance their learning experience. There was also an opportunity to join the Get Set Network by demonstrating a commitment to the Olympic and Paralympic values in order to qualify for a range of rewards. In September 2011, Get Set Goes Global was launched and focused on promoting internationalism by encouraging schools to adopt teams from different countries and to celebrate their athletes and cultures.

A further aspect of the programme, Get Set Plus, brought together programmes developed by partners in order to complement Get Set. For example, EDF Energy's The Pod was an online platform which provided lesson plans, resource packs and activities aimed at teaching 4-14 year olds how to live more sustainably.

Other activity relevant to this sub-theme can be summarised as follows:

- Podium, the further and higher education unit for the Games, was set up to communicate about the potential for universities and colleges to support the successful delivery of the Games and help create a lasting legacy, facilitate collaboration in order to develop projects which maximised the benefits of the 2012 Games and work with institutions to use the Games to enhance existing activity. Podium's website provided information on how students and institutions could get involved in the 2012 Games;
- The Higher Education Funding Council for England (HEFCE) undertook work to inform and support the higher education sector's response to opportunities provided by the Games. This work included part-funding the work of Podium (alongside the Skills Funding Agency) and also support for a number of Games-related projects through the Strategic Development Fund. Funded projects included Regional Educational Legacy in Arts and Youth Sports (RELAYS), led by universities in the South West of England, and Creative

Campus, led by universities in the South East. HEFCE also worked with British Universities & Colleges Sport (BUCS) to fund a disability officer with the aim of getting more disabled athletes involved in BUCS competitions;

- Projects undertaken by further and higher education providers, many of which were recognised at the Podium Awards in May 2012, for example, Kings College London delivered the GlaxoSmithKline schools outreach programme Scientists in Sport (see sponsor initiatives below) which aimed to encourage more 11-14 year olds to choose a career in science;
- Extensive activity to engage children and young people has taken place across the nations and regions. For example, Essex Carrying the Flame was a programme developed by Essex County Council to raise the profile of the Games and inspire children and young people, complementing the Get Set programme. The programme had engaged with over 34,000 young people by the end of March 2012;
- Opportunity Inspired by London 2012 aims to deliver on the commitment to inspire a generation of young people through the 2012 Games by working with disadvantaged young people (aged 14-25) to give them the skills they need to put them on the next step towards employment, training or volunteering. The scheme has three levels bronze, silver and gold reflecting increasing levels of challenge for participants. It is being delivered by The Prince's Trust in partnership with The Home Office's Positive Futures project, and is funded by DCMS;
- The Young Leaders programme aimed to give a group of disadvantaged young people the chance to make positive change to their lives. Supported by BP, the programme also involves LOCOG, vInspired and the Dame Kelly Holmes Legacy Trust. It provided an opportunity for personal development through formal training, development and leadership coaching support over an eighteen month period (2010-2012); each Young Leader was also expected to deliver a range of community projects resulting in wider benefits for local communities and, where possible, given the chance to be a Games Maker.

In addition to the many official initiatives and programmes included under this sub-theme, a variety of private sponsor initiatives aimed at engaging children and young people have been delivered, including:

- GSK Scientists in Sport and Anti-doping Challenge: Scientists in Sport is part of Get Set, the official education programme for the London 2012 Olympic and Paralympic Games, and GlaxoSmithKline's schools outreach programme inspired by the Games. The programme comprised a series of free events running between April 2011 and the Olympic Games in 2012. More than 20 events were held at universities for 11-14 year old school children to learn about the various uses of science in sport. As part of the programme, schools were also invited to take part in an 'Anti-doping Challenge', launched in January 2012. Participating schools were asked to design a portable drug testing kit, which could be used to detect mock banned substances.
- GE Aspiring Minds: The Aspiring Minds initiative, in partnership with the Dame Kelly Holmes Legacy Trust, used a trained group of Olympic athletes and GE volunteers to help young people raise their aspirations in life. The programme offered activities around attitudes for success, teamwork and communication, target setting and goals, problem solving, risk taking, learning from mistakes and creative thinking. The Aspiring Minds initiative reached 2,279 students over 14 events run by 83 GE Volunteers.
- GE Design My Break: As part of LOCOG's Get Set programme, GE introduced Design my Break, a competition for school children to customize a "Gold Medal" mid-day break. This was aimed at boosting emotional well-being, as well as encouraging healthy eating, physical activity and celebrating the values of the Olympic and Paralympic Games. Hundreds of schools participated in the Design My Break competition, with 30 schools reaching the regional finals which were held at seven venues across the UK with over 100 GE volunteers. The National Finals were held in London and judged by Olympic Gold Medallist Jonathan Edwards along with GE UK and Ireland CEO Mark Elborne and senior

representatives from School Food Trust, National Children's Bureau and Youth Sport Trust. The winning schools received trips to watch events at London 2012.

### (ii) Evidence available: Outputs & expenditure

The DfE provided some funding for the communications and enterprise aspects of the Get Set programme, most notably in 2011/12 when funding was provided to support the delivery of school planning days to discuss the Games legacy. The Department also provided funding to produce a languages booklet for the international element (see Figure 5-18<sup>121</sup>).

**Figure 5-18: Public expenditure on Get Set**

Legacy programme/ initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
Get Set – communications, enterprise and international elements	LOCOG (funding provided by DFE)	£255,646	£255,646	2008/09
		£548,500	£548,500	2009/10
		£289,749	£289,749	2010/11
		£1.5m	£1.5m	2011/12
		£0.5m	n/a	2012/13

Monitoring data shows that almost 26,500 establishments registered to be part of Get Set, representing 85% of the total number of those eligible to take part. In addition, 21,500 establishments successfully applied to be part of the Get Set Network.

Penetration (ie the proportion of eligible establishments registered with Get Set) in different parts of the UK ranges from 52% in Northern Ireland to 94% in the East of England (with the figure for London slightly lower at 92%). Across the UK, penetration rates for the Get Set Network range from 31% in Northern Ireland to 85% in London.

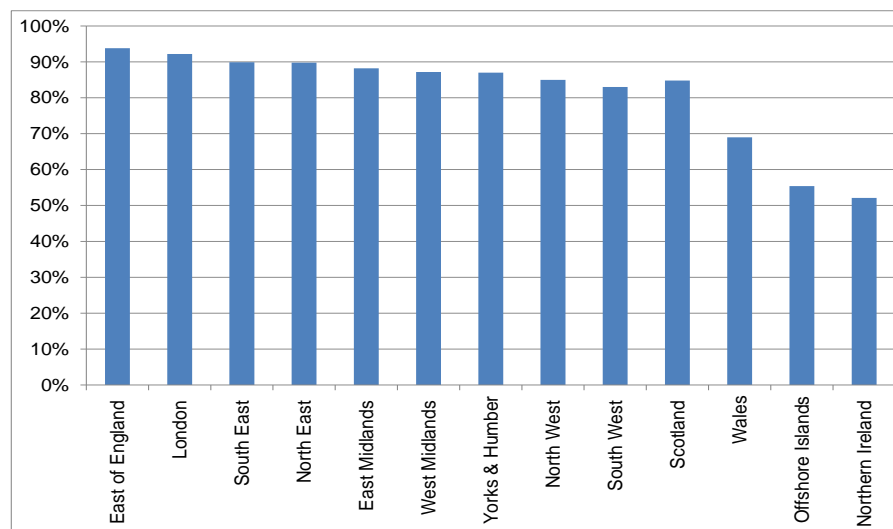
Of those establishments registered with Get Set, the majority were primary schools (85% of the total number registered), and the penetration rate for this type of establishment is 87%. Primary schools also make up the majority of those registered for the Get Set Network (69%), with a corresponding penetration rate of 66%. However, the highest penetration rates were achieved for secondary schools, 96% for the number registered and 85% for participation in the Get Set Network, rising to 96% when looking at the state school sector only. Penetration rates are lowest for establishments which fall into the 'other' category, which includes Pupil Referral Units and hospital schools (49% registered and 32% participating in the Network).

**Figure 5-19: Get Set outputs achieved**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Units	Time period
Get Set	LOCOG	No. of establishments registered	26,370	To July 2012
		Percentage of eligible establishments registered	85%	To July 2012
		No. of establishments in Get Set Network	21,500	To July 2012
		Percentage of eligible establishments in Get Set Network	66%	To July 2012

<sup>121</sup> This table relates to the DFE contribution only; data on LOCOG's contribution is not available.

**Figure 5-20: Percentage of eligible establishments registered with Get Set (penetration rates) by region**



Source: LOCOG.

Get Set Plus resources also attracted significant interest, for example over 15,700 schools registered with EDF Energy's The Pod website, along with over 20,200 teachers. Monitoring data showed that almost 48,800 lesson plans had been downloaded and almost 18,700 plans for assemblies.<sup>122</sup>

The following tables summarise public expenditure and outputs for other activity within this sub-theme; however, the following points are worthy of note:

- Initial funding for Games-related projects was made available through HEFCE's Strategic Development Fund between 2008 and 2010. However, most projects are still ongoing as a result of securing funding from other sources;
- The Young Leaders project had successfully recruited the target number of young people and mentors while delivery of community projects and recruitment of young volunteers is ongoing;
- The Prince's Trust and Positive Futures have already exceeded their target for the number of young people they have worked with as part of the Opportunity Inspired by 2012 programme. Evidence of the outcomes experienced by those who took part will be provided by the forthcoming evaluation.

In addition, over 200,000 primary school pupils across the UK have taken part in BT's the Communications Triathlon, a Get Set initiative aimed at helping children become better at expressing themselves. A series of games and activities helped develop speaking and listening skills using sporting themes, whilst also encouraging teamwork and collaboration.

<sup>122</sup> <http://www.jointhepod.org/> (data accessed on 23/05/12).

**Figure 5-21: Public expenditure on other engaging children and young people activity**

Legacy programme/ initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
Opportunity Inspired by 2012	DCMS (funder)	£526,000	£387,000 (to end 2011/12)	Jan 2011 to Sept 2012
Strategic Development Fund – Games-related Projects	HEFCE (funder)			2007-10
	Creative Campus	£1m	£1m	
	RELAYS	£1.5m	£1.5m	
	SUNEE	£1m	£1m	
	NW Sports Vol.	£103,000	£103,000	
	NUS/Coca-Cola Student Ambassador project	£60,000	£60,000	
Podium	HEFCE (funder)	£757,980	£757,980	2008/09 to 2011/12
BUCS Disability Officer	HEFCE (funder)	£60,000	£60,000	To 2012

**Figure 5-22: Other engaging children and young people activity outputs achieved**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Actual to date (target)	Time period
Young Leaders	BP	Young leaders recruited	100 (100)	2010-12
		BP coaches recruited	100 (100)	2010-12
		Young volunteers recruited	213 (900)	2010-12
		Community projects delivered	43 (100)	2010-12
Opportunity Inspired by 2012	Prince's Trust /Positive Future (delivery)	Young people	590 (500)	2011-12
Strategic Development Fund – Games-related Projects	Various (delivery)	Games-related projects funded	5 (funded through wider Strategic Development Fund)	2007-10

**(iii) Evidence available: Evaluation and research**

Two waves of evaluation of Get Set have been completed to date and a third is planned for summer 2012; this work was undertaken by Nielsen.<sup>123</sup> Quantitative data has been collected through an online survey of teachers and educators sampled from the registration database with 962 responses completed in wave 1 (2010) and 1,799 in wave 2 (2011)<sup>124</sup> and qualitative evidence was collected in 2010 through focus groups with teachers and educators and with young people from participating schools and a number of supplementary in-depth telephone interviews with teachers (in 2011).

The most common reasons for taking part in Get Set, reported by teachers in both waves, are wanting their school to feel part of the Games, that Get Set provides an opportunity to engage pupils and teachers, and to use the values to support the ethos of the school.

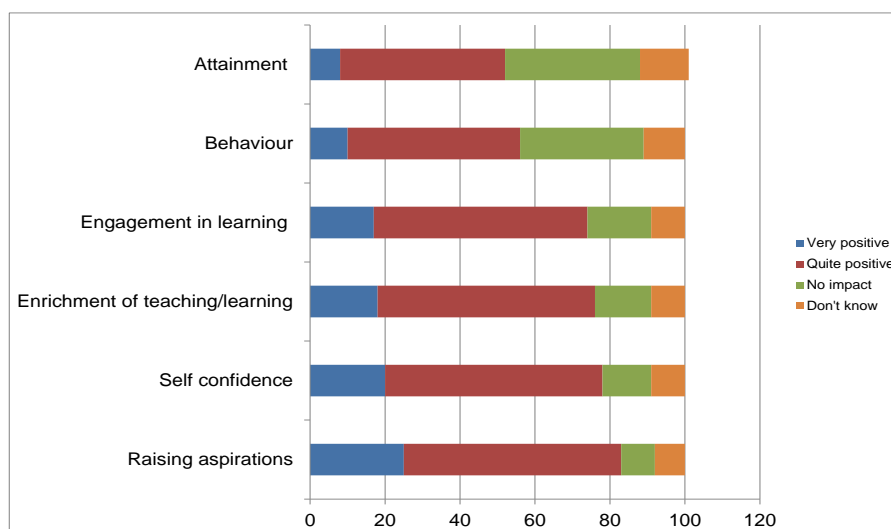
<sup>123</sup> Nielsen/LOCOG, Get Set Evaluation Report, Phase 1, Sept 2010; Phase 2, Oct 2011.

<sup>124</sup> The resulting data was weighted to represent establishment type, length of time registered and region.

In the most recent wave, 76% of schools/colleges reported that they were currently involved in Get Set to a high or medium level, this shows an increase in involvement compared to 2010 and teachers reported that they expected this involvement to increase further in 2012. Almost a third of the sample (29%) reported that they used the programme in specific lessons with PE & sport (91%) and PSHE/citizenship (55%) being the most common.

There is also evidence, reported by teachers, that the programme has had a positive effect in a number of areas for both pupils and teachers. The most commonly reported impact on pupils was raising aspirations (83% felt there had been either a very positive or positive impact in this area). In addition, 78% felt that there had been a positive impact on self-confidence/self-esteem and 75% reported a positive impact on engagement in learning. Over half of the sample noted a positive impact on behaviour (56%) and attainment (52%) (see Figure 5-23). The most commonly reported impacts on teachers were increased enthusiasm (75%) and creativity (66%).

**Figure 5-23: Get Set Pupil Impact**



Source: Nielsen/LOCOC, *Get Set Evaluation Report, Phase 2, Oct 2011*.

In the 2011 survey, 81% of teachers reported that they were either very or fairly likely to work with the Olympic and Paralympic values after the 2012 Games (increasing from 76% in 2010).

Further evidence of the impact on pupils is provided by research which was commissioned by the then Department for Children, Schools and Families (now DfE) to explore whether schools and colleges were using the 2012 Games and their associated values to help deliver their objectives for school sport and physical education.<sup>125</sup> This research included a teacher survey, pupil survey and case studies; and sampled both establishments which were registered with Get Set and those which were not, thereby providing an important insight into the additionality of the programme. Survey findings highlighted that schools and colleges that were registered with Get Set showed higher levels of involvement and engagement with the Games and values (which became higher amongst those that were part of the Get Set Network). In particular, 83% of registered establishments were involved in events or activities linked to the Games (compared with 62% who were not registered or did not know whether they were registered), 20% of registered schools agreed that the Olympic and Paralympic values had influenced activities a great deal or quite a lot during the last and current school year (compared with 14%) and 39% said that Olympic and Paralympic values have inspired lesson planning and been integrated into lessons (compared with 26%).

Almost two-fifths of pupils surveyed reported that they had learnt or done an activity related to the Olympic Games or Paralympic Games in the last school year (39%). Of those who reported learning or doing an activity linked to the Games, over three-fifths said that this took place during PE and Sport lessons (62%) and a third reported learning about the Games in other lessons (32%), including history/geography, PSHE/citizenship and design technology or ICT.

<sup>125</sup> Schools' and colleges' engagement with the 2012 Olympic and Paralympic Games: PE and sport (TNS-BMRB, 2011).

For primary school pupils the best thing (from a prompted list) about the Games being held in London was getting more people to take part in sport (27%); for secondary school pupils the best things also focused on increasing participation in sport (44% selected promotion of sport and fitness and 33% chose getting more people to take part in sport as one of their top three reasons). Secondary school pupils and students in further education were also asked about the wider benefits that involvement in sports and other activities connected to the Games might have for young people: 62% thought that this would improve confidence and communication skills, although fewer thought that it would have this effect on them personally (52%). In addition, 67% felt that involvement in sports and other activities connected to the Games would improve what young people feel they can do and achieve, although again fewer thought that it would have this effect on them personally (58%).

The research provided evidence that even by 2010/11 the Olympic and Paralympic Games values had influenced the PE and sport activities offered to pupils by schools and colleges and were being used to encourage a greater interest in and uptake of sport. In addition, most teachers surveyed expected the Games to have the biggest influence in the Olympic year 2011/12 and to continue to have an influence in the longer term.

Other research evidence relevant to this sub-theme can be summarised as follows:

- Research undertaken on behalf of Podium showed that more than 90% of UK higher education institutions were engaged with the 2012 Games and that nearly two-thirds (65%) believed they will experience a tangible legacy benefit from the Games, specifically one of lasting partnerships.<sup>126</sup> The survey elicited responses from more than 200 people from 80 different higher education institutions across the UK, which represents almost 50% of the UK higher education sector. The survey showed that the most popular type of project is volunteering (39% of institutions involved), closely followed by sports-focused activities (36% engaged). In addition, the new partners most likely to have been gained through Games-related activity are local authorities, fellow higher education institutions, LOCOG and schools. The sector has also played a part in the Cultural Olympiad and been involved in numerous Inspire projects;
- Evaluation of the Young Leaders programme has involved surveys of Young Leaders, BP coaches, young volunteers (who have assisted in delivery of community projects) and project beneficiaries.<sup>127</sup> Findings from the 2011 update report showed that the biggest improvements generated for Young Leaders by the programme at that stage (compared to the baseline survey) related to their knowledge of volunteering and leadership, their tendency to try new things, and their effort to protect the environment and the safety of others. The majority of Young Leaders (92%) believed that the programme had helped them to improve their leadership and management skills; 77% reported that they had become better public speakers. The evaluation revealed a high level of satisfaction with the programme and the level of support received. The Young Leaders highlighted the importance of the Olympic dimension and the opportunity to become more involved in/help their community, and nearly 60% felt that the programme had helped them to build confidence. Surveys of those who participated in community projects demonstrated that the events had helped to increase knowledge and excitement about the Games amongst both adults and young people. The majority of adults (84%) who participated in a community project reported having a more positive view of young people as a result and 91% agreed that the role of the volunteers was crucial. Over half (54%) said that after participating in the project they were more likely to become volunteers themselves and 74% were more interested in getting involved in local activities. In addition, two-thirds (67%) of young people who attended community projects suggested that they would like to help out with a community project in future themselves.

<sup>126</sup> Olympic and Paralympic Games: The Impact of Universities (Podium, Universities UK and BUCS, April 2012).

<sup>127</sup> Evaluation of the London 2012 Young Leaders Programme. Update December 2011 (Skyblue Research).



**(iv) Conclusions: Outcomes and additionality**

The key interventions for this sub-theme would not have taken place in the absence of the Games. The Get Set evaluation provides evidence of positive outcomes with improvements in pupil self-confidence, engagement with learning, behaviour and attainment being perceived by teachers as a result of involvement in the programme. However, at this stage there is only limited evidence of the views of young people themselves and no exploration of whether this has translated into an effect on variables such as pupil attendance and academic performance and whether any effect is significant compared to that experienced by non-participating schools.

**(v) Progress in answering the research questions**

*To what extent, and in what ways, have the 2012 Games positively affected the aspirations and pride of children and young people, including through educational activity to promote Olympic and Paralympic values?*

Evaluation evidence to date demonstrates that educational activity such as Get Set has been used successfully as a means to increase engagement and involvement in the Games amongst young people. Teachers perceive that this had led to a range of positive outcomes for pupils, including raised aspirations; however, at present there is limited evidence of the views of young people themselves, including the effect on aspirations and pride, and so it is not yet possible to make an assessment of the extent to which Games-related educational activity has impacted on these variables.

*What indications are there that relevant legacy interventions improved social and economic life opportunities for participating children and young people, and particularly hard-to-reach participants, and how was this achieved?*

The Young Leaders programme has successfully engaged with a group of disadvantaged young people. When surveyed, a high proportion reported that they had improved skills and built confidence as a result of taking part which suggests that the programme could have a positive impact on their future life opportunities. In addition, the Opportunity Inspired by 2012 project has made good progress towards its target of supporting 500 disadvantaged young people; however, at the time of drafting, evaluation activity was only just getting underway and so it is not yet possible to comment on outcomes.

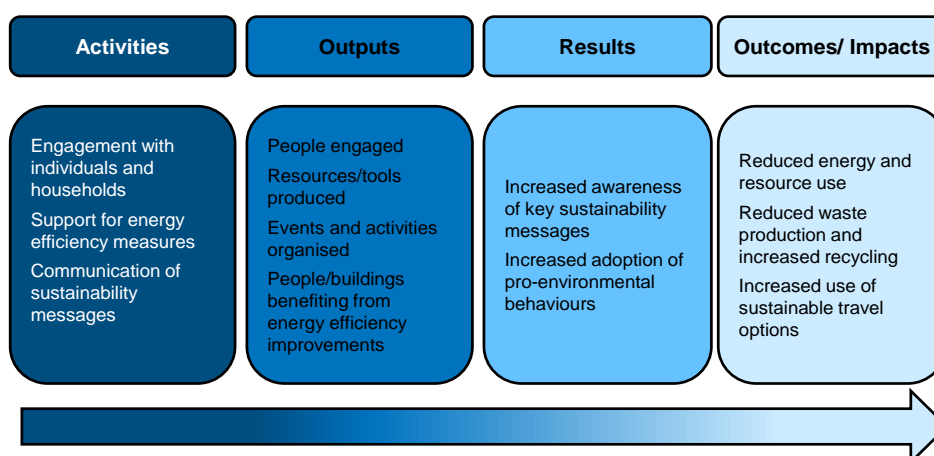
## 5.5 Encouraging sustainable living

This sub-theme considers the extent to which the Games has been used to inspire people to live more sustainably, for example by encouraging people to reduce their carbon footprint, be more energy efficient, make more sustainable travel choices and increase the amount of waste recycled.

Indicators relating to sustainable behaviours are generally showing positive trends (for example increasing volumes of household waste being sent for recycling). However, the Games provide a significant additional driver of behavioural change which is expected to have a supportive effect on attitudes towards sustainability and uptake of pro-environmental behaviours.

As behavioural change can take time to encourage and embed, data on the extent of this outcome area will also take time to emerge. However, the following diagram provides a summary of the intervention logic for this sub-theme.

**Figure 5-24: Sustainable living summary logic model**



### (i) Legacy programmes and initiatives

DEFRA's Inspiring Sustainable Living programme provided start-up grants for projects aimed at helping people to live more sustainable lives by drawing on the 2012 Games as inspiration. The four funded projects were selected in late 2010 and will run until March 2013.

- Bio-Regional's One Planet Experience: an interactive exhibition centre located in the London Borough of Sutton which explained how the 2012 Games aims to be the greenest games ever, plus an additional exhibition located in the Athletes' Village and a programme of engagement with local residents (in Sutton) and athletes. This project also secured support from Coca-Cola;
- Groundwork London's Transform Project: aimed to transform 20 derelict and neglected sites into local green spaces/community gardens, encourage and support residents to create less waste/recycle more, and increase levels of environmental volunteering and community involvement in the five host boroughs;<sup>128</sup>
- East Potential Inspired to Sustainable Living: provided practical advice and support to East Thames residents in Newham to increase understanding and practice of sustainable approaches to energy, water and waste. The project also worked with Focus E15 Foyer<sup>129</sup> residents to encourage healthy eating through the use of growing sites and workshops amongst disadvantaged young people;
- Sustrans Active Travel Champions: provided training and support for volunteers to act as champions to encourage people to make healthier and more environmentally friendly travel

<sup>128</sup> As a result of securing additional funding from SITA Trust the number of sites to be transformed was increased to up to 50 across the host boroughs.

<sup>129</sup> A foyer is a place where young people can live and receive support to achieve their goals. Focus E15 is the largest foyer in the UK and provides services to young people in the London Borough of Newham on both a residential and non-residential basis (source: [www.east-thames.co.uk](http://www.east-thames.co.uk)).

choices in communities located close to Olympic venues in London and the South of England.

The ODA also contributed to activity in this sub-theme by providing funding to increase the capacity of the Mayor of London's RE:NEW and RE:FIT programmes in the host boroughs.

- RE:NEW: a pan-London home energy efficiency scheme which aims to lower CO<sub>2</sub> emissions by offering households a visit from a home energy advisor who provides free energy efficiency advice and offers a range of easy energy improvement measures at no cost, such as energy saving light bulbs, radiator panels, aerated showerheads and loft and cavity wall insulation where appropriate;
- RE:FIT: a programme offering a cost neutral way of improving the energy efficiency of public sector buildings. Participating organisations appoint an energy service company (ESCO) from the Mayor of London's RE:FIT framework to install energy efficiency measures and guarantee annual energy and cost savings over an agreed payback period resulting in a net saving over the longer-term.

In addition, LOCOG developed plans for communicating sustainability messages during Games-time,<sup>130</sup> this included:

- Production of a 'Green Games Guide' for media and visitors containing practical information on how to take-up sustainable behaviours inspired by the Games, covering travel, recycling and energy efficiency;
- Providing the media with information and resources on sustainability including key facts, briefing packs and guided tours;
- Development of Walk in the Park, a trail for spectators running through the heart of the Olympic Park, including a series of story stations that tell the story of how the park was redeveloped and the creative thinking that went into staging the Games.

EDF was also the 2012 Games sustainability partner, promoting sustainability in a number of ways resulting in legacy outcomes.

#### (ii) Evidence available: Outputs & expenditure

The following table shows the level of public expenditure involved in this sub-theme.

**Figure 5-25: Public expenditure on Inspiring Sustainable Living**

Legacy programme/ initiative	Lead Organisation	Budget (£m)	Actual (£m)	Time period
Inspiring Sustainable Living	DEFRA	£0.8m	£0.8m	2010/11

DEFRA provided £0.8 million of funding for Inspiring Sustainable Living which resulted in start-up grants of £200,000 for each of the four selected projects, paid in 2010/11.

As noted, Inspiring Sustainable Living has supported four individual projects. Across the four projects the scale of achievements to date has varied; however, the programme-level evaluators reported that prior to the Games delivery was progressing well in all cases (see Figure 5-26). It is important to note that in the case of East Potential, the audience they were attempting to influence is more disengaged than that for the other projects and designing interventions has been more of a challenge than initially expected. However, in late 2011, the project restructured its interventions and most of the recorded progress has been made since that time.

<sup>130</sup> Delivering Change. Pre-Games Sustainability Report (LOCOG, April 2012). Further information on efforts to promote sustainability is provided in Section 4.8.

**Figure 5-26: Outputs achieved to date by Inspiring Sustainable Living**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Actual to date (lifetime target)	Time period
One Planet Experience	Bio-Regional	No. of visitors (to One Planet Experience Sutton)	1,055 (2,012)	To March 2012
Transform	Groundwork London	No. of sites transformed	6 – complete 27 – in progress (50)	To March 2012
		No. of people directly engaged	2,015 (800)	To March 2012
Active Travel Champions	Sustrans	No. of travel champions recruited	125 (250)	To March 2012
		No. of beneficiaries reached	8,000 + (18,750)	To March 2012
Inspired to Sustainable Living	East Potential	No. of participants (environmental awareness)	21 (1,500)	To March 2012
		No. of participants (healthy eating)	30 (80)	To March 2012

Significant outputs are also expected to be achieved as a result of the ODA's contribution of £1.7 million to the GLA to invest in carbon reduction measures for local housing and schools in four host boroughs through the existing RE:NEW and RE:FIT programmes. This represents additional funding which would not have been available in the absence of the Games. The funding will be used to benefit at least 2,780 homes and 12 schools. At the time of drafting the rollout of the programme to homes was underway but actual figures could not yet be confirmed; however, the 12 schools had been selected. Work was progressing on schedule and the schools element was expected to complete in September 2012 and the homes element by December 2012. The target is for 1,300 tonnes of CO<sub>2</sub> savings to be achieved, this is made up of 800 tonnes from homes as a result of the installation of simple energy efficiency measures, loft and cavity wall installation and 500 tonnes<sup>131</sup> from schools through the installation of lighting and heating measures.

EDF's promotion of sustainability resulted in the recruitment of around 1 million people to Team Green Britain, an online community which aimed to reduce their carbon footprint ahead of 2012. In addition, 6.5 million young people from 15,800 schools were engaged with the Pod, EDF Energy's programme for greener schools, part of the London 2012 education programme

### **(iii) Evidence available: Evaluation and research**

A question to assess the influence of the Games, and its sustainability commitments, on the adoption of sustainable behaviours and attitudes was included in the specially commissioned host boroughs residents survey (see Appendix C). Of those who responded to this question, around one-fifth (21%) reported that the Games had prompted them to make a change, most commonly increased recycling or protection of their local environment.

### **(iv) Conclusions: Outcomes and additionality**

The available data shows that the Inspiring Sustainable Living projects have been largely successful in engaging with their target groups which is a step towards achieving positive outcomes. However, monitoring reports show that projects have recognised the difficulties of

<sup>131</sup> However, following the procurement process the successful contractor has committed to delivering around 700 tonnes of CO<sub>2</sub> savings as a result of work in schools.

both securing behavioural change and collecting evidence to demonstrate this achievement. At present, outcome evidence is limited due to the fact that evaluation has yet to take place.

**(v) Progress in answering the research questions**

*To what extent and in what ways did the Games inspire people to live more sustainably, and what were the benefits of this?*

There is encouraging evidence that a significant number of people have participated in Games-related sustainability projects. However, at present there is insufficient evidence to demonstrate the outcomes of this engagement in terms of adoption of sustainable behaviours and the resulting benefits of this change. It is expected that further evidence will be available as an input to Report 5. More generally, the survey of East London residents found that 21% of those who were aware of the sustainability commitments connected to the Games reported that they had been influenced by this, for example by recycling more. This is a positive outcome as it demonstrates that the sustainability messages connected to the Games are already encouraging local residents to adopt sustainable behaviours.

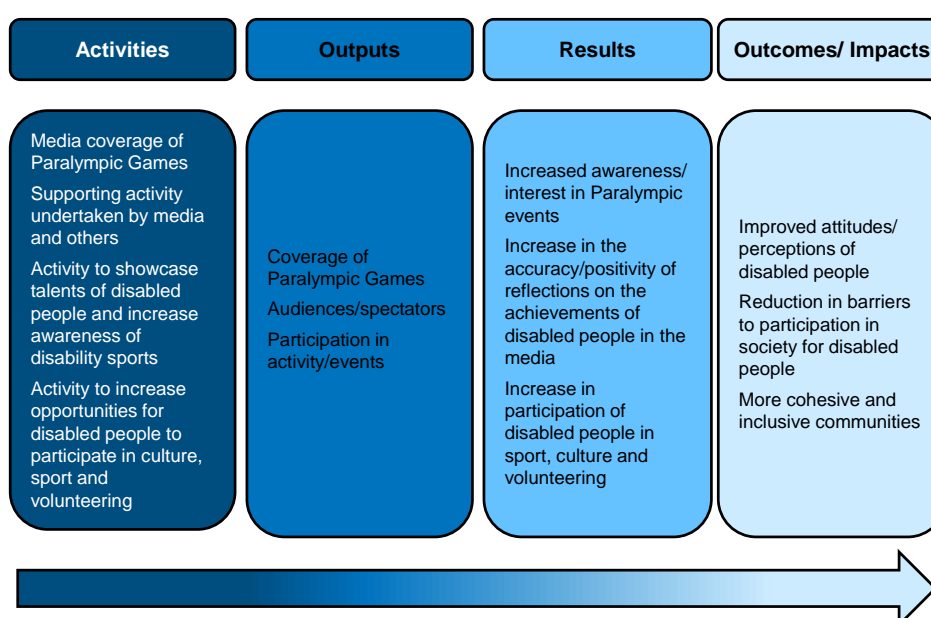
## 5.6 Influencing attitudes towards disabled people

The Government legacy plan sets out the intention to use the Games to influence attitudes towards and perceptions of disabled people, through encouraging comprehensive media coverage of the London 2012 Paralympic Games, promoting inclusion and disability equality to ensure Games-related opportunities are available to all, engaging children and young people to improve understanding of disability, and encouraging disabled people to participate in community activity and social action.

The available evidence shows some improvement in attitudes towards disability in recent years, with a number of measures on the British Social Attitudes Survey improving over the period 2005 to 2009.<sup>132</sup> However, the Games provide a significant opportunity to generate media coverage which provides positive messages about disabled people, which would not have been possible on an equivalent scale otherwise. It is hoped that this will generate a significant change in public attitudes and perceptions.

The Paralympic Games provides a focal point for these efforts therefore the full impact of this sub-theme is only likely to be realised following the Games. The following logic model sets out the expected theory of change for this sub-theme.

**Figure 5-27: Attitudes towards disabled people summary logic model**



### (i) Legacy programmes and initiatives

The extensive television and multi-media coverage of the Paralympic Games was an area of activity that was intended to contribute to challenging and changing perceptions of disabled people.

Channel 4 successfully bid for the UK television rights to the London 2012 Paralympic Games, which they described as "*the broadcast of the biggest single event in our thirty year history, the London 2012 Paralympic Games*".<sup>133</sup> Channel 4 provided live coverage towards a target of 150 hours across the 11 days of the event and aimed to promote the Paralympic Games in a way that was unparalleled in the past, exceeding all previous benchmarks for hours of coverage and viewing figures.

<sup>132</sup> Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games: Report 3 – Baseline and Counterfactual (Grant Thornton et al, 2012).

<sup>133</sup> Channel 4 (May 2012) 'Channel Four Television Corporation Report and Financial Statements 2011'. This document is available for download from [www.official-documents.gov.uk](http://www.official-documents.gov.uk) and from [www.channel4.com/annualreport](http://www.channel4.com/annualreport)

Channel 4 undertook significant work to raise the profile of Paralympic sports and athletes in the two years prior to the Games, having stated its intention to use the event as an opportunity to influence perceptions towards disabled people.

*"As a major sporting event, we aim to take the Paralympic Games to a new level. We will be nurturing much-needed disabled presenting talent and hope that our coverage will also help to bring about a shift in attitudes to disability."*<sup>134</sup>

Other activity which has taken place to improve attitudes towards disabled people was described by the London 2012 Equality and Diversity Forum in their third annual report. For example, work by Government Olympic Executive (GOE) officials and LOCOG to consider how assets from the Paralympic Games could be redistributed to benefit disabled people in education and employment, including sports equipment and accessible technology.<sup>135</sup> LOCOG ran a diversity awareness week in March 2011 during which various activities took place including the launch of a disability pin badge and also hosted an access summit for deaf, blind and disabled people to show how they could get involved with the Games. Sport related programmes such as the Change4Life Clubs, Playground to Podium and the School Games promoted Paralympic sports alongside Olympic sports to school age children and young people (see Section 3), while Get Set helped to increase awareness of Paralympic sports and values (see Section 5.4).

Further work has also been undertaken, for example in April 2012 DCMS hosted a disability sports summit which aimed to consider how to make the most of the Paralympics opportunity and also give disabled people an opportunity to share their views and explore the value that sport brings to their lives.

In addition, the Office for Disability Issues (ODI) has worked in a range of ways to support improved attitudes towards disabled people, with target audiences including Government departments, businesses and the general public. In September 2012, the Government published two documents and announced the setting up of a new disability action alliance as part of the next steps of a cross-government disability strategy.<sup>136</sup> The documents summarise the issues raised by disabled people and the actions the Government is taking to address them and sets out the Government's vision and principles and further public sector reforms. The disability action alliance will carry forward ideas proposed by disabled people, helping shape and deliver the outcomes they want, and the Government will join with disability organisations, as well as private sector and public sector, to start to change attitudes and create inclusive communities around the country.

The ODI has worked with Channel 4, and other Olympic sponsors and hopes to continue this work, post-Games, with an emphasis on awareness and attitude change. Press coverage during Games time saw the Minister for Disabled People raising awareness about disability. ODI worked with the BPA to produce a media guide for sports journalists to encourage reporting on the Paralympics. The ODI also worked with the London Business Network, ran an event during Games time, and also launched a guide for businesses on how to become more accessible.

There has also been an emphasis on disability within the cultural programmes, for example the Unlimited programme was intended to play a major role in challenging perceptions of disability by showcasing the world class talents of the UK disability arts movement, and also expanding even further the opportunities for direct engagement with arts and culture for disabled people. Accentuate, the Legacy Trust UK programme for the South East of England, also promoted the skills and talents of disabled people and worked with organisations in the region to improve access for disabled people.

<sup>134</sup> Channel 4 (May 2012) 'Channel Four Television Corporation Report and Financial Statements 2011'. This document is available for download from [www.official-documents.gov.uk](http://www.official-documents.gov.uk) and from [www.channel4.com/annualreport](http://www.channel4.com/annualreport)

<sup>135</sup> 'Working Towards an Inclusive Games 2010-11. The third annual report of the London 2012 Economy and Diversity Forum' (May 2011) pp.67.

<sup>136</sup> Information about the alliance and the two documents is available here: <http://odi.dwp.gov.uk/fulfilling-potential/>

### **Box 5-5: 5-Star Disability Sports Challenge**

5-Star Disability Sports Challenge is a groundbreaking programme focused on educating young people about disability, disability sports and the Paralympic Games. The project aims to highlight and promote the benefits of disability sport to the public in Northern Ireland, to transform commonly held negative attitudes and perceptions about disabled people, and to inspire and encourage more disabled and non-disabled primary school children to become more active in sport.

The programme involves engaging pupils from Primary 1 to 7 through an awareness-raising presentation designed to be both educational and fun. The presentation is delivered by at least one elite disabled athlete. The presentation is followed by the older children taking part in a practical session of challenges involving a circuit of five activities with each based on a Paralympic sport.

By January 2012, 5-Star had reached over 20,000 children from over 200 schools across Northern Ireland. Overwhelming positive feedback has been received from both the children and teachers involved. It has been showcased in the UK's Disability Action Plan and is also being shared internationally through International Inspire.

*Source: [www.london2012.com/about-us/inspire/inspire-projects-across-uk/northern-ireland/](http://www.london2012.com/about-us/inspire/inspire-projects-across-uk/northern-ireland/)*

### **(ii) Evidence available: Outputs & expenditure**

In the build up to the Games, Channel 4 prepared a range of programmes, including 'That Paralympic Show' which showcased disabled athletes and disabled sports, and reached 5.4 million people overall.<sup>137</sup> A series of film shorts, supported by Sainsbury's and BT reached a total of 15.4 million people. In addition, a documentary series called 'Best of British' followed Paralympic athletes in their sporting and private lives as they aimed to be selected for the 2012 London Paralympic Games.<sup>138</sup>

Channel 4 also promoted positive attitudes towards disabled people through a commitment that 50% of on-screen talent for Paralympic broadcasts would be disabled people.

*"Channel 4 has today unveiled a groundbreaking line-up of presenters and reporters featuring top sports broadcasters, former Paralympians and new disabled talent for its coverage of the London 2012 Paralympic Games in August. In line with the channel's vision on winning the broadcast rights to the Games, 50% of the presenters and reporters in the line-up will be disabled." (February 2012)<sup>139</sup>*

In order to meet this commitment, Channel 4 conducted recruitment, selection and rigorous training for their disabled presenters. Seven new disabled presenters were part of the on screen team, including former Paralympic athletes, a former carpenter and a researcher (see Box 5-6 below). In addition to the Paralympics, Channel 4 plan to feature disabled people prominently throughout the year in other types of programmes, from comedy to documentaries.<sup>140</sup>

<sup>137</sup> Viewing figures measured according to accepted industry standards.

<sup>138</sup> See <http://www.channel4.com/programmes/best-of-british>

<sup>139</sup> Channel Four (Feb 2012) Press Release 'Channel Four assembles groundbreaking Paralympic presenting team'.

<sup>140</sup> Channel Four (May 2012) 'Channel Four Television Corporation Report and Financial Statements 2011'. This document is available for download from [www.official-documents.gov.uk](http://www.official-documents.gov.uk) and from [www.channel4.com/annualreport](http://www.channel4.com/annualreport)



**Box 5-6: Channel 4 promote disabled talent on screen**

Peak time live coverage of the Games on Channel 4 was fronted by TV presenter and former Paralympic wheelchair basketball medalist Ade Adepitan alongside the well-known sports broadcaster Clare Balding.

Seven individuals were selected through Channel 4's search for disabled talent in 2010 which used rigorous application, selection and training procedure to select candidates. The seven included Irish presenter Dar ine Mulvihill and former Royal Marine Arthur Williams working in the studio and new reporters on location including former Paralympic swimmer Rachael Latham, sports reporter and wheelchair basketball player Jordan Jarrett-Bryan, former carpenter Martin Dougan, researcher Liam Holt and sports journalist Alex Brooker.

Additional reporters included former Paralympic middle-distance runner Danny Crates, and former Paralympic swimmer Giles Long.

Early evidence of the impact of Channel 4's efforts to meet its commitments regarding disability was provided by an Ipsos MORI survey which showed that Channel 4 was the channel to which the largest proportion of people believed the following statement most applied: 'Shows the viewpoints of disabled people' (14% compared with 10% for BBC One, 7% BBC Two, 3% ITV and 2% Channel Five).<sup>141</sup> Qualitative and quantitative research will be undertaken in-house post-Games to help Channel 4 to ascertain the effect the level of coverage and investment in disabled talent has had on viewers' perceptions of disabled people. In addition, viewing figures for Paralympic broadcasts will also be available. The media content analysis to be undertaken as part of the Cultural Olympiad evaluation will also capture wider evidence concerning perceptions of and attitudes towards disability.

The BPA reported that the media guide produced for sports journalists in conjunction with the ODI received very positive feedback and attracted greater take up than anticipated; 200 copies were originally distributed and there was demand for a further 200 to be sent out, plus further copies were downloaded online. This successful initiative would not have happened without the Games.

**(iii) Conclusions: Outcomes and additionality**

The staging of the Paralympic Games has been used as a mechanism to engage with the public and provide an opportunity to increase awareness and understanding of disability. It is extremely unlikely that this activity would have taken place at a comparable scale and intensity had London not been chosen to host the 2012 Games, indicating a high level of additionality (of activity).

Data on activity and outputs reveals some success in terms of engagement but information on outcomes is limited at this stage. The most recent wave of the evaluation of Get Set provides some insight, revealing that 50% of teachers responding to the survey agreed that there had been a positive change in pupils' attitudes towards disability.

The London 2012 Cultural Olympiad took an innovative and unprecedented approach by creating a disability arts programme that is not specific to the Paralympic Games but instead cuts across both Games, thus maximising opportunities to reach out to a broader audience and making this issue more central across both Games.

**(iv) Progress in answering the research questions**

*To what extent have the 2012 Games increased levels of awareness and understanding of disability amongst young people and the general public (including through influencing media coverage and education legacy work at home and abroad)?*

Viewing figures for Channel 4's pre-Games programming point to an interest in learning more about disability and the Paralympics. In addition, programmes such as Get Set have helped to raise awareness of the Paralympics amongst children and young people and half of the

<sup>141</sup> Channel Four (May 2012) 'Channel Four Television Corporation Report and Financial Statements 2011'. This document is available for download from [www.official-documents.gov.uk](http://www.official-documents.gov.uk) and from [www.channel4.com/annualreport](http://www.channel4.com/annualreport)

participating teachers surveyed believed that involvement in Get Set had helped to generate a positive change in pupil attitudes towards disability. However, at present there is a lack of evidence to assess the impact of these efforts more generally and this question will be better answered in Report 5 when it is anticipated that further evidence will be available.

***To what extent have the 2012 Games increased positive perceptions of and pride in the talents of disabled people (amongst both disabled and non-disabled people), through the work of UK broadcasters and through supporting and celebrating sporting, cultural and community achievements across the UK?***

It is too early to tell how much progress has been made in respect of generating positive perceptions of and pride in the talents of disabled people. However, there were numerous initiatives which aimed to generate a change in perceptions, including a range of programmes produced by Channel 4 and Unlimited, a series of commissions by disabled artists which formed part of the Cultural Olympiad. This issue will be considered again in Report 5 by which time it is anticipated that further evidence will be available.

## 5.7 Summary research question

*What have been the social impacts of the Games, particularly in terms of volunteering, the cultural sector and community engagement?*

There is already some early evidence to suggest that the Games are having a positive social impact. Activity concerned with community engagement and volunteering continued to gather pace during Games-time although a significant number of events had already taken place prior to the Opening Ceremony.

Games-related projects have been successful in capturing the interest of numerous people across the country, which has resulted in the recruitment of volunteers and engagement with local communities. This includes the significant number of people across the country who have helped to deliver or participated in an Inspire Mark project and/or attended an event which formed part of the Cultural Olympiad. There is also some evidence that those who have participated in Games-related activity intend to continue being involved in their local community and perceive that this activity has helped to increase community cohesion in their area. However, at this stage there is limited evidence of the more general effect on participation in volunteering and culture, and the outcomes experienced by participants and the sector.

Significant work has been undertaken to engage with children and young people. Get Set, for example, achieved high penetration in terms of the proportion of eligible establishments which registered with the programme. Evaluation evidence suggests that participation had a positive effect on pupils and teachers and the view of teachers is that the programme helped to raise pupil aspirations, confidence/self-esteem and engagement in learning. A number of smaller-scale projects targeting disadvantaged young people have also taken place, along with activity to support the involvement of the further and higher education sectors. Elements of the Cultural Olympiad such as Stories of the World and Tate Movie have also resulted in the involvement of significant numbers of young people.

Activity to inspire sustainable living has also made good progress in terms of engagement with its target audiences, although evidence of the extent to which this has resulted in the uptake of sustainable behaviours is not yet available.

Work to change attitudes towards disability was largely focused on the Paralympic Games itself, complemented by additional work to improve understanding of disability and encourage disabled people to participate in community activity and social action.

Although considerable progress has been made in terms of filling gaps in the evidence base for the community engagement and participation legacy theme, a significant amount of research activity will take place in the latter part of 2012 and this evidence will be incorporated into Report 5.

## 5.8 Progress and next steps

Although considerable progress has been made in terms of filling gaps in the evidence base for the community engagement and participation legacy theme, a significant amount of research activity will be taking place in the latter part of 2012. This will be collated over the coming months and provide a valuable input to Report 5.

The following tables summarises the status of forthcoming evidence (and how this relates to the timeframe of the current study) and the current proposals for dealing with the remaining evidence gaps.

<b>Evidence expected to emerge for Report 5</b>
Inspire Survey Wave 2 (November 2012)
Games Maker Survey (November 2012)
London Ambassadors Survey (November 2012)
Cultural Olympiad Evaluation (interim) (October 2012)
Legacy Trust Programme Evaluations (December 2012)
Get Set Evaluation (final wave) (October 2012)
Opportunity Inspired by 2012 Evaluation (November 2012)
British Social Attitudes Survey (disability module) (December 2012)
<b>Possible/ Proposed approaches to addressing the evidence gap in Report 5</b>
Cultural Olympiad (final evaluation report due February 2013) – use findings of audience survey plus information contained within interim report.
Inspiring Sustainable Living (final project-level evaluation reports due March 2013; final programme-level evaluation report due June 2013) – where possible, use emerging findings from project-level progress reports.

## 6 Driving the regeneration of East London

### 6.1 Introduction

The acceleration of the regeneration of East London is a central component of the legacy of the 2012 Games. East London has suffered from long-standing problems of multiple deprivation and as a result it has historically been one of the poorest parts of the UK, struggling to keep pace with many of the socio-economic advances experienced elsewhere in London. The Games provided a unique opportunity to directly and indirectly tackle these issues and to contribute to the social and economic transformation of East London.

In headline terms, the legacy strategy for East London can be summarised by two inter-related and over-arching objectives:

- Ensuring that the Olympic Park can be developed after the Games as one of the principal drivers of regeneration in East London – maximising the investment made, as a direct result of the Games, in venues, infrastructures, utilities and the environment;
- Securing a socio-economic legacy from the Games in the host boroughs<sup>142</sup> so that, *"within 20 years, the communities which host the 2012 Olympic and Paralympic Games will enjoy the same social and economic chances as their neighbours across London"*.<sup>143</sup>

These headline objectives have resulted in a broad suite of investments and activities focused on the regeneration of East London, all of which can be grouped under the four legacy sub-themes of transforming place, transforming communities, transforming prospects and convergence. These sub-themes provide a framework for our analysis and synthesis of the emerging evaluation evidence.

This chapter sets out the evidence available structured according to each of the sub-themes, the progress made in gathering necessary data and the relevant evidence still to emerge.

### 6.2 Transforming place

The transforming place sub theme is focused on the legacy effects and impacts arising from the physical development and regeneration of East London. It looks at both the creation of the Olympic Park – with a particular focus at this stage on the demolition and build phases – and its post-Games usage, as well as the wider process of 'placemaking' both on and off the Olympic Park. It is a sub theme that is spatially focused on the Olympic Park and its 'area of influence', defined as a 2km boundary around the Olympic Park.<sup>144</sup>

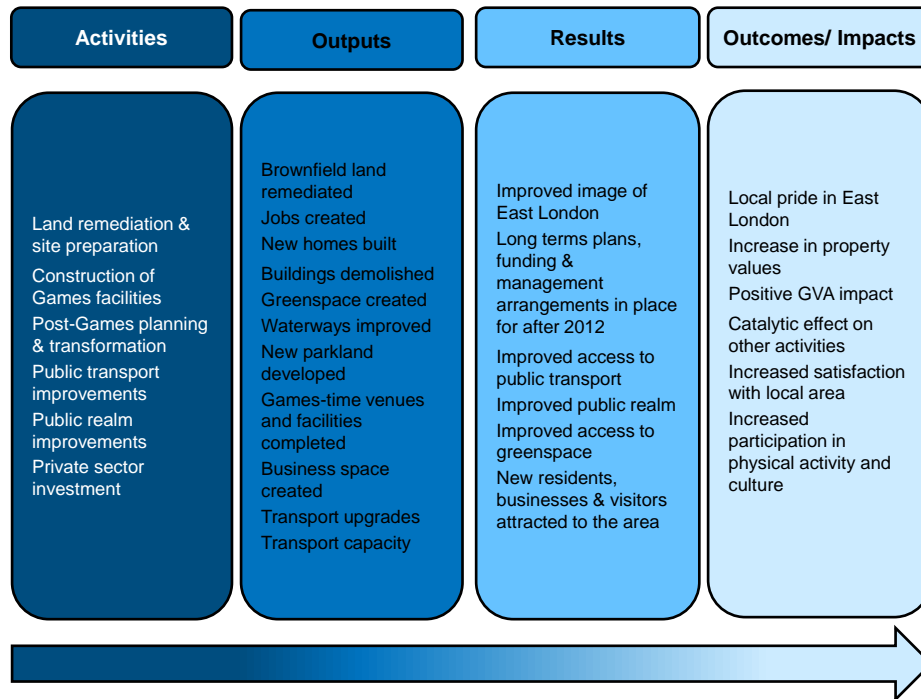
The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for this sub-theme. The focus of the logic model is on those indicators where most progress has been made to date.

<sup>142</sup> This includes the six London Boroughs of Greenwich, Hackney, Newham, Tower Hamlets, Waltham Forest and Barking and Dagenham – their work is lead and coordinated by a dedicated Host Borough Unit.

<sup>143</sup> Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs (October 2009).

<sup>144</sup> It is within this area where the main impacts of schemes related to hosting the Games are anticipated to be felt.

Figure 6-1: Transforming place summary logic model



### (i) Legacy programmes and initiatives

The delivery of this sub-theme is centred on a small number of significant programmes of activity, including:

- The acquisition and remediation of the land making up the Olympic Park and wider Stratford City site. A programme of activity that was initially led by the LDA before being handed over to the ODA;
- The planning, development and post-Games transformation of the sporting venues and the Olympic Park. The planning and development of the Olympic Park has been the responsibility of the ODA (initially through the LDA) with post-Games transformation the responsibility of the London Legacy Development Corporation (LLDC) (formerly the OPLC);
- A number of public transport improvements with the aim of increasing capacity and accessibility. This included a significant redevelopment of Stratford station as well as major upgrades to the DLR and North London Line;
- A programme of public realm improvements in the areas surrounding the Olympic Park. This activity has centered on a programme of public realm capital schemes that have been delivered by a number of organisations including the host boroughs, DCLG, LDA, TfL, the Homes and Communities Agency and the London Thames Gateway Development Corporation. The programme comprised 71 projects and was focused on 10 priority 'packages' of activity;
- Wider private sector investment in the area. The most significant of which to date was made by Westfield at the Stratford City site adjacent to the Olympic Park. Others include the expansion of the ExCel Exhibition Centre, the Strand East mixed-use development in Stratford by the Inter IKEA Group, the Siemens Sustainability Centre in the Royal Docks, hotel development by Travelodge and Premier Inn and Lend Lease's investment in the further development of the Stratford City site.

These programmes and initiatives have also been supported by a series of strategic documents that have guided, influenced and shaped the subsequent activities on the ground. This has included three Olympic and post-Games legacy master plans:<sup>145</sup>

- The 2004 initial master plan which was developed to support the London 2012 bid and underpin the compulsory purchase of the land required. This was also accompanied by a master plan showing the proposed regeneration proposals for the site if the bid was unsuccessful;
- The 2006 master plan which saw the merger of the Games and Stratford City master plans to "*achieve efficiency in development funding, construction logistics and operational management as well as enhance legacy benefits*".<sup>146</sup> In particular, this saw the major residential component of the Stratford City proposal become the Olympic Village. This master plan formed the basis of the eventual planning permissions for the Olympic, Paralympic and legacy transformation master plans;
- The final revised master plan (2007) which covered Games-time, transformation and legacy. This master plan sought to enhance "*legacy benefits further, adopt more sustainable approaches and improve deliverability*".<sup>147</sup> The revised master plan proposals also refined the Games infrastructure to provide the "*best solution to support legacy development and minimize [the] transformation required to deliver a more efficient master plan*".<sup>148</sup>

#### **(ii) Evidence available: Outputs & expenditure**

Across some of the programmes and initiatives within this sub theme it is possible to identify the expenditure incurred or planned and the outputs achieved or expected. This information provides a valuable insight into both the scale and the specific nature of the legacy effects with regard to transforming East London. For some programmes and initiatives, this information has been formally captured in an existing evaluation or through an organisation's project monitoring systems. Where this has been the case, this is summarised in the two tables that follow.

<sup>145</sup> Institution of Civil Engineers (2011). Delivering London 2012: parklands and waterways. Published in Civil Engineering 164.

<sup>146</sup> ICE (2011). Delivering London 2012: parklands and waterways. Published in Civil Engineering 164.

<sup>147</sup> ICE (2011). Delivering London 2012: parklands and waterways. Published in Civil Engineering 164.

<sup>148</sup> ICE (2011). Delivering London 2012: parklands and waterways. Published in Civil Engineering 164.

**Figure 6-2: Public expenditure on transforming place**

Legacy programme/ initiative	Lead Organisatio n	Budget (£m)	Actual (£m)	Time period
Land acquisition and remediation & Planning, development and post-Games transformation of OP	ODA <sup>149</sup>	6,550	6,550	2005-2012
Land acquisition and remediation	LDA <sup>150</sup>	1,154	1,071	2003-2011
Planning, development and post-Games transformation of OP	LDA <sup>151</sup>	344.6	319.6	2003-2011
Planning, development and post-Games transformation of OP	LLDC <sup>152</sup>	223.3	N/A	2012-2014
Public Realm improvements	Host boroughs <sup>153</sup>	190	100	2009-2012

In relation to the figures included in the table above it is important to note the following:

- While the LDA's expenditure on land acquisition and remediation is below budget the original budget figure was significantly revised between 2003 and 2011, from an original estimate of £478 million;<sup>154</sup>
- A proportion of the LDA's expenditure on planning, development and post-Games transformation of the Olympic Park was more directly linked to the delivery of the Games (ie making sure the land was remediated on time) as opposed to the legacy.<sup>155</sup>

<sup>149</sup> Figure identified in the ODA supplier database – note that a small amount of spend may be missing from the early years.

<sup>150</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>151</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report) – Figure is a sum of expenditure on 'Organisational and process support' and 'Urban design and regeneration planning'.

<sup>152</sup> LLDC Business Plan – investment will follow the Games when LLDC assumes responsibility for converting the Olympic Park site and venues into their legacy uses.

<sup>153</sup> Information provided directly from the host boroughs.

<sup>154</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>155</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).



**Figure 6-3: Transforming place outputs achieved**

Legacy programme/ initiative	Lead Organisation	Total Outputs/KPI achieved	Units	Time period
Land acquisition and remediation	LDA	209	Brownfield land remediated/ redeveloped (Ha)	2003-2011
Land acquisition and remediation	LDA	207	Businesses Supported	2003-2011
Land acquisition and remediation	LDA	3,246.5	Jobs created/ safeguarded (FTE)	2003-2011
Land acquisition and remediation	LDA	55,959	Commercial space provided (sq. m)	2003-2011
Land acquisition and remediation	LDA	60	New homes	2003-2011
Planning, development and post-Games transformation of OP	LLDC	25 *	% local people employed on the Park	2012-2014
Planning, development and post-Games transformation of OP	LLDC	- #	% construction workforce with permanent residency (12 + months) in the host boroughs	2012-2014
Planning, development and post-Games transformation of OP	LLDC	10*	% construction workforce that were previously unemployed	2012-2014
Planning, development and post-Games transformation of OP	LLDC	25*	% construction workforce from BAME groups	2012-2014
Planning, development and post-Games transformation of OP	LLDC	5*	% construction workforce who are women	2012-2014
Planning, development and post-Games transformation of OP	LLDC	3*	% construction workforce who are disabled	2012-2014
Planning, development and post-Games transformation of OP	LLDC	3*	% construction workforce who are apprenticeship places	2012-2014
Planning, development and post-Games transformation of OP	LLDC	75*	% construction waste to be diverted from landfill	2012-2014

*Note: \* These figures are target outputs as opposed to achieved; #LLDC currently in process of defining specific target*

In reviewing the data in the table above, it should be noted that the LLDC is still working through its corporate measurement and monitoring processes – in part as part of its negotiation with development partners. Therefore, the figures shown in the table above should be seen as illustrative of the likely scale of outputs that will be delivered in the future.

In addition to these formal, monitored outputs it has also been possible to identify a number of interventions related to the Games that have been delivered 'on the ground' and, given the physical nature of these interventions, it can be concluded that they have, and will continue to contribute to the transformation and regeneration of East London changing the look, feel and functioning of the area.

The most significant of these physical interventions is obviously the creation of the Olympic Park and venues (see Figure 6-4 for a comparison of the Olympic Park between 2008 and 2012). Following the LDA's programme of acquisition and remediation, the ODA assumed responsibility for further remediation of the site along with its planning and development. This programme of activity ran from July 2006 to July 2011 and cost an estimated £6.5 billion.<sup>156</sup>

<sup>156</sup> Based on figures provided by ODA for its expenditure between 2007 to the end of Q1 2012 – see Section 4.1.

During this period the ODA split its activity into four broad stages<sup>157</sup> each of which was guided by 10 delivery milestones and each of which delivered a number of notable outputs that specifically benefitted – and helped drive forward the regeneration of – East London. These included the:<sup>158</sup>

- Remediation and clean-up of 2.5 sq km of brownfield land;
- Demolition of more than 200 buildings;
- Undergrounding of 52 power pylons;
- Creation of a new utilities network to provide power, water and sanitation to the site;
- Reuse or recycling of 98% of materials generated through the demolition process;
- Creation of 100 hectares of greenspace;
- Planting of 4,000 semi-mature trees;
- Creation of 2,818 homes in the Athletes Village;
- Creation of permanent sporting venues in East London including the Olympic Stadium, the Aquatics Centre, the Velodrome and associated cycle tracks, the Handball Arena, hockey pitches and tennis courts;
- Creation of 80,000 sq m of business space through the International Broadcast Centre/Main Press Centre (IBC/MPC);
- Building of more than 30 bridges and connections.

The policy counterfactuals developed as part of the Report 3 meta-evaluation<sup>159</sup> concludes that it is clearly evident that without the Games the new Olympic venues would not have been constructed and the Olympic Park would not have existed.

The legacy outcomes emerging from the transformation of these venues will begin to become apparent from as early as mid- to late-2013. The first of which will be the conversion of the Athlete's Village and the delivery of 2,818 additional apartments and town houses – 1,379 of which will be social housing (managed by Triathlon Homes) with the remaining 1,439 private homes (managed by Qatari Diar/Delancey (QDD)). This will be quickly followed by the conversion of the Athlete's health centre into a community health centre and the conversion of Operations Centre into a new Academy (Chobham Academy). Together, this activity will see the creation of 'East Village' and the first new community in the park.

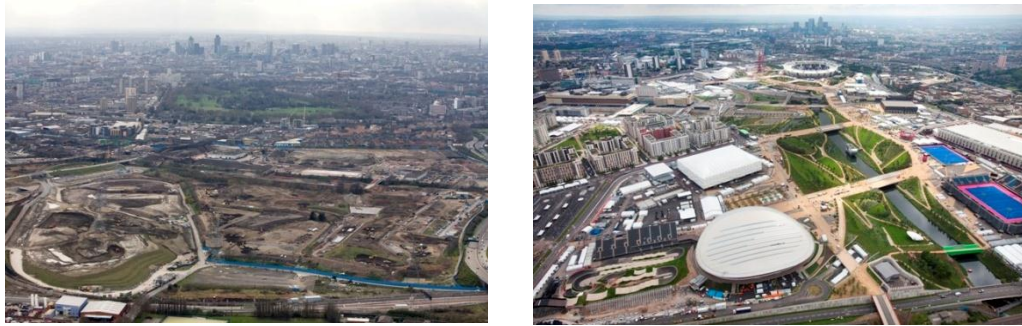
However, given that this transformation process has only just commenced with the completion of the Games, the true legacy impact of the Olympic Park and its associated venues will not be fully apparent for a number of years (not least because the LLDC is yet to implement its programme of activity (see above and below). Although, what is currently apparent is that the Games have already made a significant contribution to the physical transformation of this area of East London.

<sup>157</sup> 'Demolish, dig, design' – with milestones to the Beijing 2008 Games; 'The big build: foundations' –with milestones to 27 July 2009; 'The big build: structures' – with milestones to 27 July 2010; and 'The big build: completion' – with milestones to 27 July 2011.

<sup>158</sup> Olympic Delivery Authority (2011). Building the Olympic Park 2005-2011.

<sup>159</sup> See Report 3: Baseline and Counterfactual.

**Figure 6-4: The Olympic Park in 2008 and 2012**



*Source: Olympic Delivery Authority. 2008 photograph looks South West across the northern part of the Olympic Park. 2012 photograph looks South from Eton manor.*

Another important legacy initiative has been the improvement of public transport in East London. It is apparent through consultation with and information provided by TfL<sup>160</sup> that a number of transport improvements have been implemented. It is possible to conclude that these improvements can – to varying degrees – be attributed the 2012 Games, as set out in the policy counterfactuals described in Report 3 of the meta-evaluation<sup>161</sup>. This has largely been a catalytic role, with the Games bringing forward planned investments but there has also been some new additional investment resulting in improvements that would not have happened in the absence of the Games. In terms of existing investments brought forward as a result of the Games, these include:

- A £125 million project to double the capacity at Stratford Regional Station from 37,000 commuters during the morning peak in 2008 to an expected 83,000 during the morning peak in 2016. The work includes nine new lifts, eight new staircases, a re-opened subway, new platforms, wider, longer and clearer platforms and a new station entrance;<sup>162</sup>
- Upgrades to the DLR, including expansions to the network from Canning Town to Stratford International, and from East India and Blackwall to Woolwich Arsenal; increasing the number of rail cars from two to three and boosting on-board capacity by 50%; and a more frequent service in part driven by improvements to busy junctions on the network;<sup>163</sup>
- Upgrades to the North London Line including new signals, extra tracks and longer platforms which enable four-car, rather than three-car, trains to operate and therefore significantly boost capacity;<sup>164</sup>
- The conversion of the North London Line to DLR operation between North Woolwich and Stratford; infrastructure upgrades at Blackwall and East India stations; modifications between Poplar and Woolwich Arsenal; and increased station capacity at Prince Regent (to serve the ExCeL exhibition centre).

In terms of new, additional investments, these include:

- Upgrade of West Ham London Underground station including the construction of a temporary walkway to help with the high number of spectators travelling to the Olympic Park;<sup>165</sup>
- A cable car between the Royal Docks and Greenwich Peninsula with a journey time of five minutes and the potential to carry up to 2,500 people in each direction per hour;<sup>166</sup>

<sup>160</sup> Including: TfL (2011). Leaving a transport legacy.

<sup>161</sup> See Report 3: Baseline and Counterfactual.

<sup>162</sup> Olympic Delivery Authority (2008). Transport Update Issue 2: Transport for 2012 and beyond.

<sup>163</sup> Olympic Delivery Authority (2008). Transport Update Issue 2: Transport for 2012 and beyond.

<sup>164</sup> Olympic Delivery Authority (2008). Transport Update Issue 2: Transport for 2012 and beyond.

<sup>165</sup> Olympic Delivery Authority (2011). Transport Big Build – Complete.

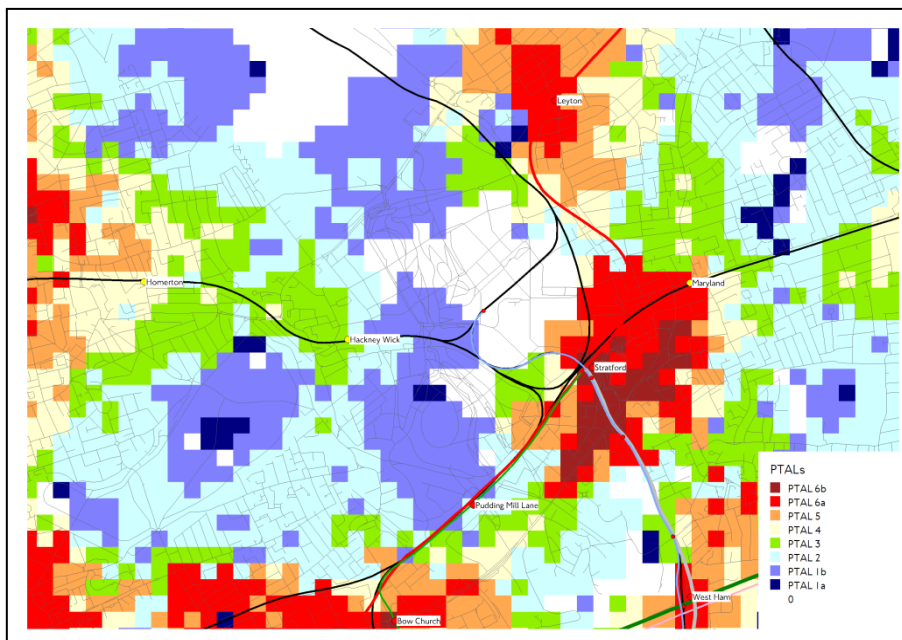
<sup>166</sup> <http://www.london.gov.uk/priorities/transport/investing-transport/making-better-use-river-transport/cable-car>

- A new TfL Transport Coordination Centre which provides integration and coordination of traffic and transport agencies as well as coordination with security and emergency agencies. This in turn helped improve transport capacity through real-time traffic management as well as helping smooth traffic flow. It will also provide ongoing benefit through delivering new and improved collaboration and coordination of the multimodal transport providers and service operators.<sup>167</sup>

One result – but by no means the only – of these improvements in transport infrastructure is the role they can play in improving accessibility to public transport. Using TfL's Public Transport Accessibility Level (PTAL) data it is possible to understand the difference made by these improvements in transport provision. The following three illustrative diagrams show the levels of accessibility to public transport in the immediate vicinity of the Olympic Park, centred on a point just to the west of Stratford International Station.<sup>168</sup> Visually these maps show how the transport improvements, including those still to be implemented, result in some locations around the Olympic park increasing from PTAL level 0 (effectively zero access to public transport within the specified criteria and illustrated by the white areas on the map) to the highest PTAL value of 6 by 2014 (illustrated by the dark red area).<sup>169</sup>

More specifically, between 2010 (Figure 6-4) and 2012-2014 (Figure 6-5) significant change in the PTAL scores took place in three areas, as indicated by the three blue rings in Figure 6-5. These improvements were largely driven by the improvements to Stratford Station (the increase in dark red shading) and the significantly improved accessibility resulting from the creation of the Olympic Park (the change from the white shaded area to the green, and the change from light red shaded area to red).

**Figure 6-5: Accessibility to public transport in the vicinity of the Olympic Park – Pre-Games 2010**



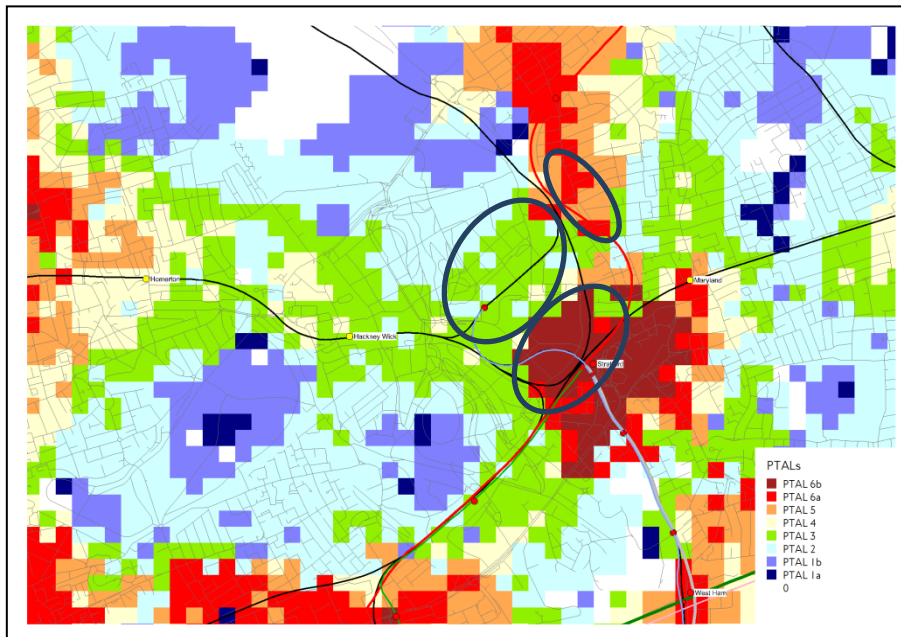
*Source: Transport for London.*

<sup>167</sup> Transport for London (2010). Transport for London Investment Programme 2010 – Surface Transport.

<sup>168</sup> Transport for London (2011). Travel in London – Report 4.

<sup>169</sup> Transport for London (2011). Travel in London – Report 4.

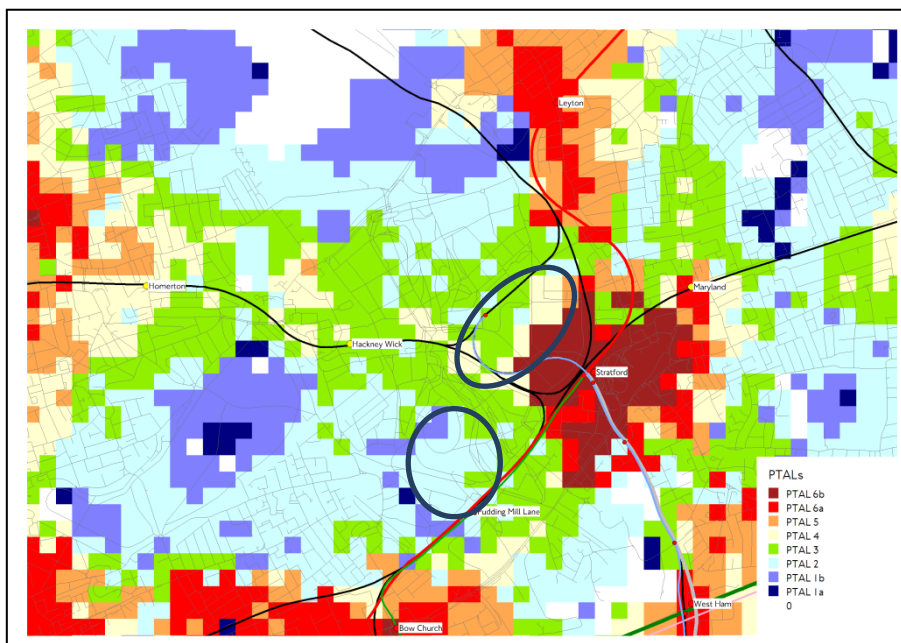
**Figure 6-6: Accessibility to public transport in the vicinity of the Olympic Park – Post-Games Transformation 2012-2014 onwards**



Source: Transport for London.

Between 2012-2014 (Figure 6-5) and post 2014 (Figure 6-6) the changes are less significant and are primarily related to the further 'opening up' (including entrances, exits and pedestrian routes) and accessibility improvements resulting from the transformation of the Olympic Park (the change from green shading to pink, and from blue shading to light blue).

**Figure 6-7: Accessibility to public transport in the vicinity of the Olympic Park – Post Legacy Activities 2014 onwards**



Source: Transport for London.

A similar story is also true for investment in the wider public realm where a number of improvements can either be directly attributed to the 2012 Games or they have been catalysed and brought forward as a result of the Games.

In terms of the former, this includes environmental and access improvements at Hackney Marshes and improvements to town squares such as Walthamstow. With regard to the latter,



this includes improvements to Stratford town centre, improvements to road interchanges and the provision of walking and cycling routes in the North East fringe and improvements to various transport interchanges in Hackney, Walthamstow and Leytonstone.

As with the other investments, these improvements have already contributed and will continue to contribute to the physical transformation of East London, although at this stage it is not possible to assess the quantum of this contribution.

### **(iii) Evidence available: Evaluation and research**

One of the primary sources of evaluation evidence available is the LDA 2012 Games Legacy Impact Evaluation Study.<sup>170</sup> The LDA was one of the key agencies tasked with delivering the early stages of the legacy strategy for this sub-theme, particularly the programme of land acquisition and remediation. This evaluation provides a robust but partial (due to the limited availability of impact data at the time the evaluation was undertaken) assessment of its activity.

From the outset of the bid preparation process, and as early as May 2003, the LDA recognised the opportunity to use the 2012 Games as a catalyst for the regeneration of East London. It was therefore always the LDA's explicit aim to use the 2012 Games to accelerate this process<sup>171</sup> describing East London as "*London's available and spare economic capacity and asset base, and also the place with the most severe socio-economic challenges*".<sup>172</sup>

Through the evaluation of the LDA's activity in relation to the preparation for and subsequent legacy of the 2012 Games in and around the Olympic Park it is possible to identify a number of findings that contribute to the emerging evidence base for this sub-theme. In particular, this evidence, coupled with a number of other important sources, provides valuable insight into both the wider regeneration effects that have resulted from the significant physical transformation activities noted above and an understanding of the processes and approach involved in driving forward the design and development of the Olympic Park – helping to ensure that it was delivered on time and on budget.

#### Wider regeneration effects

As has already been noted, one of the primary drivers of regeneration in East London has been the transformation that has resulted from the development of the Olympic Park and the associated improvements in public transport and the wider public realm. While it is not yet possible to fully assess or quantify the legacy impacts in East London of these investments and activities, what is apparent through the evaluation evidence available is that a number of wider regeneration benefits and effects have already accrued as a result of the Games.

Through the LDA evaluation it is apparent that the requirement for one organisation to assemble all of the land in the Olympic Park resulted in a "*more comprehensive and joined up site*" than might have been possible in the absence of the 2012 Games. The evaluation notes that without this requirement, the land acquisition process "*would potentially have been more piecemeal and less integrated*" and while this may have "*resulted in lower costs (ie the necessity to acquire the whole site may have resulted in higher costs of land and/or the need to undertake more expensive remediation)*" and a "*better return on investment*", had it not occurred, then the Olympic Park could not have been developed. This would in turn have resulted in a reduction in the scale of overall regeneration activity in East London and the potential loss of a number of "*economies of scale*" that arose from the regeneration of a single site.<sup>173</sup>

In addition to a more integrated site, the 2012 Games was also thought to have created a more integrated timetable for regeneration (than if London were not the host city for the 2012

<sup>170</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>171</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>172</sup> Organisations for Economic Co-operation and Development (2010). Local Development Benefits from Staging g Global Events – Achieving the Local Development Legacy from 2012. Cited in PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>173</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

Games) which had two notable impacts. First, it created a firm deadline for delivery, the absence of which would have resulted in a slower pace and required a more selective approach to regeneration. Second, it meant that the investment in regeneration in East London was immune from the recent spending cuts that affected a number of other regeneration projects across the UK.<sup>174</sup>

In terms of specifics, these wider regeneration effects are perhaps best illustrated in the Stratford City/Westfield development that adjoins the Olympic Park site. The Economic Impact Assessment of the Westfield Stratford City Development<sup>175</sup> sets out the scale and nature of these effects on phase 1 of 'Zone 1' of this development. Zone 1 comprises two phases: Phase 1 included 1.9 million square feet of retail and leisure space – the "*largest urban shopping centre in Europe*" – and opened in September 2011. Phase 2 contains a significant amount of commercial space, along with some leisure, and is expected to be fully completed by 2020.<sup>176</sup>

It is apparent through the economic impact of Westfield, the LDA evaluation and our own research with Westfield that Westfield intended to develop the shopping centre at Stratford City (Phase 1) prior to the formal launch of London's bid for the 2012 Games.<sup>177</sup> However, what is also apparent through all three sources of evidence is that in reality the delivery of Phase 1 was "*made possible by the infrastructure investment underpinning the Olympic Games*"<sup>178</sup> – investment that the Volterra study estimates to be in the order of £500-£600 million.<sup>179</sup> It should be noted that in addition to this, the private sector investment from Westfield was around £1.43 billion for the retail elements of Phase 1 plus a further £180 million for the hotel and office elements in Phase 2.

In particular, the LDA evaluation notes two explicit ways in which the investment in the 2012 Games supported this development:<sup>180</sup>

- The Compulsory Purchase Orders (CPOs) that the LDA implemented as part of its acquisition process benefited Stratford City/Westfield by also including land in the area which Westfield was seeking to develop. This enabled economies to be realised and also ensured that private sector investment (through Westfield) was levered in to cover some of the costs associated with the CPOs;
- The impact of the economic downturn on the Stratford City/Westfield development was minimised "*largely because the development was so closely linked to the delivery of the Olympic Village*" and as such "*it was protected by the Government under its commitments to the 2012 Games*". This ensured that the necessary momentum remained while the required infrastructure was completed.

As a direct result of this Games-related investment, Volterra (in direct consultation with Westfield) estimate that it enabled Westfield to "*bring forward [the] development around 5-7 years earlier than would otherwise have occurred*". The study assumes this means that the economic impact<sup>181</sup> arising out of the development is being delivered 5-7 years earlier as a result of the 2012 Games. Volterra put the value on delivering these benefits earlier at between £1.1 billion and £1.6 billion to the London economy, if 5 years earlier; and between £1.5 billion and £2.2 billion if seven years earlier. By evaluating this impact against the public sector spend of £0.6 billion, Volterra concludes that it represents very- or extremely- good value for money

<sup>174</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>175</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

<sup>176</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

<sup>177</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

<sup>178</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

<sup>179</sup> Volterra based this estimate on historical estimates of both infrastructure items required to deliver the site and Section 106 obligations across Zones 1 to 7 of the Stratford City outline planning permission. Our own research directly with Westfield suggest that the public sector infrastructure investment (channelled through the ODA) may have been as low as £200 million.

<sup>180</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>181</sup> Volterra estimate that the construction of Phase 1 created the equivalent of 10,400-11,900 job years and generate earnings of between £370 million and £390 million. It also estimated that the operation of Phase 1 would create the equivalent of 10,000 permanent jobs – with a head count as high as 14,100 – through its retail, leisure and commercial operations, which could generate between £165 million and £215 million in annual earnings from September 2011 onwards.

(depending on which figure is used).<sup>182</sup> This positive outcome does however need to be viewed within a wider East London context, particularly the potential negative consequences that may arise for high streets and town centres across the area as a direct result of a successful Stratford City. The question of whether, and to what extent, Stratford City has or will displace retail and leisure activity from elsewhere in London is a complicated one, and one that will be explored in more detail in Report 5.

The evidence currently available also suggests that these wider regeneration effects include a positive impact on residential property prices in East London. Georgios Kavetsos<sup>183</sup> explored the impact of the London Olympics announcement on property prices and estimated that London's successful bid to host the 2012 Games did "*seem to have a substantial impact on property values*". The study found that the successful bid increased property prices in the five host boroughs of Greenwich, Hackney Newham, Tower Hamlets and Waltham Forest, on average by 2.1% between 7 July 2005 (and the decision to award the Games to London) and March 2007, although if Greenwich is removed this figure actually rises to 3.3%. This increase is estimated to have added £1.4 billion onto the price of properties in the host boroughs.<sup>184</sup> A similar investigation based on three-mile radius rings, rather than borough boundaries, suggests that the greatest impact on property prices is within the three mile radius from the main Olympic Stadium, where property sells for 5% more.<sup>185</sup>

In identifying this positive impact the study acknowledges that the increase in residential property prices will have "*substantial social and financial implications for existing residents*" not all of which will be positive. The study notes that while this increase might be "*good news*" for some property owners it is also "*likely to have devastating implications for those in low income bounds residing in the locality*" with the resulting gentrification of East London potentially resulting in the "*social exclusion of the poorest households*".<sup>186</sup> In order to mitigate this possible negative impact the current plans for new homes in and around the Olympic Park include a notable proportion of social and affordable housing (just under 50% of the homes in the Athlete's Village and 35% of the homes to be delivered by the LLDC through its transformation of the Olympic Park). It is therefore too early to assess the extent to which these implications will emerge and their specific nature but it is an issue that will again be explored further in Report 5.

#### *Delivery processes and approach*

Through the LDA evaluation it is possible to identify a number of lessons that relate specifically to the process and approach taken in developing the Olympic Park and its longer term legacy.

It is apparent from the LDA evaluation that in delivering its activities the LDA demonstrated a 'boldness' that enabled the Olympic Park site to be developed on schedule and for the regeneration benefits of the 2012 Games legacy for East London to be driven forward from the earliest point possible. This 'boldness' was perhaps most apparent in the LDA's willingness to provide early investment in activities related to the Games, including:

- Appointment of an interim team to advise the Agency on legal, financial, property and project consultancy matters relating to London's bid for the 2012 Games (May 2003) and appointment of a consortium led by EDAW to prepare the master plan for the proposed London Olympics in East London's Lower Lea Valley (Aug 2003) before London officially launched its bid for the 2012 Games (Jan 2004);
- Submission of a planning application for a 500 acre Olympic Park in the Lower Lea Valley covering key venues such as the main Olympic Stadium, the Aquatics Centre and the Velodrome (January 2004) before London was shortlisted as a 2012 candidate city (May 2004);

<sup>182</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

<sup>183</sup> Urban Studies (2012 Issue 49). The Impact of the London Olympics Announcement on Property Prices; Georgios Kavetsos.

<sup>184</sup> Urban Studies (2012 Issue 49). The Impact of the London Olympics Announcement on Property Prices; Georgios Kavetsos.

<sup>185</sup> Urban Studies (2012 Issue 49). The Impact of the London Olympics Announcement on Property Prices; Georgios Kavetsos.

<sup>186</sup> Urban Studies (2012 Issue 49). The Impact of the London Olympics Announcement on Property Prices; Georgios Kavetsos.



- Launching a design competition for the Aquatics Centre (June 2004) and selecting a winning design (Jan 2005); had planning permission granted for the Olympic Park (Sept 2004); had begun the process of land acquisition (Jan 2004) and started undergrounding the powerlines (Jan 2005). This was all undertaken prior to London being awarded the right to host the 2012 Games.

Of this early investment, the land acquisition carried the most risk as it involved the greatest cost (prior to the bid's success, the LDA acquired 86ha at a cost of £125 million including fees). It was however a risk that was mitigated by following four investment principles that allowed for a 'no' decision and thus enabled the LDA to acquire the land on a 'no regrets' basis:<sup>187</sup>

- The LDA should only buy land during the bid period which could be used for other regeneration purposes should the bid be unsuccessful;
- Land assembly for the Olympic zone should be aligned with the Olympic Legacy Master plan for the area;
- Consideration should be given to the post-Olympic legacy;
- Land receipts from disposal should be retained by the LDA for re-investment.

The result of this process of early acquisition was that by July 2006, one year after the award of the Games, the LDA had assembled 90% of the land required by private agreement. This paved the way for the completion of the first major phase of land assembly and relocations of existing tenants according to schedule by July 2007 which was "*crucial*" to enabling the subsequent development of the venues and ultimately the timely delivery of the Games.<sup>188</sup>

A further benefit of the early lead taken, and boldness shown, by the LDA, and perhaps more significant in terms of the legacy, was that from the outset there was a clear commitment to securing a legacy from the 2012 Games, something that was formally articulated as early as January 2004 and the submission of the planning application for the Olympic Park. This provided a solid foundation on which subsequent regeneration plans and frameworks for parts of East London could be built. It was an approach that led the London Assembly to conclude (in 2009) that London was ahead of many other host cities both in developing its proposals for the legacy use of the Olympic Park and its commitment to social transformation in East London – an approach that "*exceeds the ambitions of many past host cities*".<sup>189</sup>

This early preparation work also "*received praise from the IOC and experienced Olympic observers*", with Denis Oswald the Chair of the International Olympic Committee (IOC) Coordination Commission noting that: "*London already has a clear idea of the steps that need to be taken to turn its ambitious plans into reality. Such thoroughness is commendable and was one of the strengths of London's candidature*".<sup>190</sup> It was a role that also received commendation from the OECD as it noted that "*although many cities have achieved a significant legacy, and several have planned activity in advance to achieve it, few cities will have prepared for it as directly and consciously as London has*".<sup>191</sup>

It was a view echoed by the Royal Institution of Chartered Surveyors (RICS) who, based on comparison with six previous event led regeneration programmes, noted that London's legacy planning represented a "*significant improvement on arrangement in previous hosts*" and that regeneration legacy planning for the 2012 Games has been "*addressed more convincingly and earlier than in most previous cases*" something that has allowed "*proposals to be debated and prepared properly*".<sup>192</sup>

<sup>187</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>188</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>189</sup> London Assembly, Economic Development, Culture, Sport and Tourism Committee (2009). Literature Review: Olympic Legacy Governance Arrangements. Cited in PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>190</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>191</sup> OECD (2010). Local Development Benefits from Staging Global Events – Achieving the Local Development Legacy from 2012. Cited in PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>192</sup> RICS Research (2011). The 2012 Games: The Regeneration Legacy.

In direct comparison with six previous event led regeneration programmes the RICS report notes seven examples of particular good practice in relation to the 2012 Games. These include: *"the choice of a site that provided good opportunities for regeneration; the early onset of legacy planning; involving a wide range of different stakeholders; unequivocal support from the UK Government; building on long term plans for London and existing regeneration projects; the expression of aspirations for the wider area beyond the Olympic Park; [and] attention to social and economic regeneration, as well as physical transformation"*.<sup>193</sup>

More recently, in March 2012 and as part of his final inspection visit, Jacques Rogge the President of the IOC commented that London had *"raised the bar on how to deliver a lasting legacy by incorporating long-range planning in every aspect of the 2012 Games"* and in doing so had *"created a legacy blueprint for future Games hosts"* with the *"tangible results"* already apparent in *"the remarkable rejuvenation of East London"*.<sup>194</sup>

However, it is apparent through the LDA evaluation that this boldness did come with a cost. The LDA budget for land acquisition and remediation doubled from £478 million in 2003 to £1,095 million in 2011, while the total area covered by the Olympic Park site actually decreased from 161 ha to 101 ha.<sup>195</sup> The LDA evaluation identified five factors that it believe drove this increase:

- Remediation costs were between £114 million and £223 million higher than estimated;
- Additional land was purchased in 2004 to cover a proposed increase in the total area of the Olympic Park (207 ha compared to 161 ha) which while it did not materialise, increased the cost by £138 million;
- £102 million was attributed to acquiring additional land outside of the Olympic Park for the relocation of local businesses and to kick-start the regeneration of other key development sites;
- £12 million of additional fees were allocated to cover the actual costs of producing the Olympic Master plan;
- £60 million was spent on estate management fees (where tenants remained on site following acquisition), professional fees and stamp duty.

These increased costs (coupled with the decrease in the size of the Olympic Park) meant that the average costs per hectare of land acquired and remediated<sup>196</sup> rose from £2.97 per ha to £10.84 per ha. The LDA evaluation notes that this increase will *"have a significant impact on the assessment of the economy and cost-effectiveness of the LDA interventions in this area"*.<sup>197</sup> However, the evaluation repeatedly notes that given the long term nature of the legacy plans it is too early to robustly and comprehensively assess both the legacy impact and its value for money.

#### **(iv) Conclusions: Outcomes and additionality**

It is already apparent that the 2012 Games have made a significant contribution to the physical transformation of East London. Based on the evidence available it can be concluded that without the Games the largely derelict, polluted and inaccessible site would have remained for the foreseeable future, the new Olympic venues would not have been constructed and the Olympic Park would not have been created. Coupled with this the hosting of the Games has had catalytic effect on a number of significant transport improvements at Stratford station and on the North London Line, to name but two, as well as a number of public realm improvements throughout the host boroughs.

<sup>193</sup> RICS Research (2011). The 2012 Games: The Regeneration Legacy.

<sup>194</sup> DCMS (2012). Beyond 2012 The London 2012 Legacy Story.

<sup>195</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

<sup>196</sup> This calculation was based on the total cost of land assembly and includes compensation claims as part of the relocation programme.

<sup>197</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix An Olympic Park & Lower Lea Legacy/Land Delivery (Final Report).

Furthermore, the Games has also leveraged wider private sector benefits, the most notable of which is the role that the Games played in bringing forward the Westfield Development at Stratford City – and all the employment and economic benefits associated with it – by between five and seven years. As a result of this activity parts of East London already look, feel and function differently to how they did before London was awarded the right to host the Games, and perhaps more significantly to how they would have done had London not been awarded the right to host the Games.

However, while change is already apparent, the true legacy impact of the Olympic Park and its associated venues will not be fully realised for a number of years. One of the over-riding conclusions from the LDA's 2012 Games Legacy Impact Evaluation Study was that with regard to the Olympic Park and Lower Lea legacy, it is simply too early at this interim stage to assess whether the scale and quality of the activities implemented by the LDA were reasonable and effective or what impact they have had in transforming East London over and above what would have been achieved anyway. It is a conclusion that undoubtedly holds true for this sub theme as a whole and the different organisations involved in implementing activities.

#### **(v) Progress in answering the research questions**

##### ***What have been the key lessons from the preparation of the site for the Olympic Park and Village?***

At this stage two key lessons from the preparation of the site have emerged, both of which are inter-related. The first is the need for 'boldness' in the delivery of activities. This boldness was perhaps most apparent in the willingness to provide early investment in activities related to the Games – before the bid had even been won – and is perhaps best illustrated in the early acquisition of 86ha of land for the Olympic Park (a risk that was mitigated through a 'no regrets' approach that allowed for a 'no' decision). This early commitment and boldness was a cornerstone in ensuring that the Olympic Park was developed on schedule.

Linked to this, and secondly, is the commitment to delivering a long term legacy from the 2012 Games. This commitment has ensured that the Olympic Park and Village have from the outset been designed and developed with the legacy in mind. It was a commitment that was formally articulated as early as 2004 and was reinforced by the establishment of a specific organisation (the OPLC, now the LLDC) with responsibility for the delivery of the legacy.

##### ***How and to what extent has the rate and range of development activity and long-term management of the Olympic Park (and its venues and neighbourhoods) been secured?***

One of the primary ways in which both the rate and range of development activity and the long-term management of the Olympic Park has been secured has been through tasking specific organisations with responsibility for them. In particular:

- The ODA was established with the specific remit of building the park, a process that was split into four broad stages of: demolish, dig, design; the big build: foundations; the big build: structures; and the big build: completion. Each stage was driven forward by clear deadlines and milestones.
- The LLDC was established with the specific remit of delivering the legacy of the Games. The LLDC assumed responsibility for the Olympic Park shortly after the completion of the Games and has developed a comprehensive programme of activity through which it aims to: deliver social, economic and environmental benefit and convergence for East London; deliver financial returns to the public purse over the long term; and optimise sustainability and success of the Olympic Park and venues.
- A third organisation, LOCOG, was tasked with the responsibility for running the Games.

##### ***What new transport links and accessibility improvements have been implemented in support of the Games and Olympic Park (and what benefits have these delivered for current and future residents and visitors?)***

It is apparent that a number of new transport links and accessibility improvements have been implemented as a direct result of the 2012 Games, such as the upgrade of West Ham London Underground station, the development of a cable car between the Royal Docks and Greenwich Riverside and a new TfL Transport Coordination Centre.

In addition, it is also apparent that a number of improvements have been catalysed, both in terms of scale and speed of delivery, as a result of the Games. This includes doubling the capacity at Stratford Regional Station, upgrades to the DLR and upgrades to the North London Line.

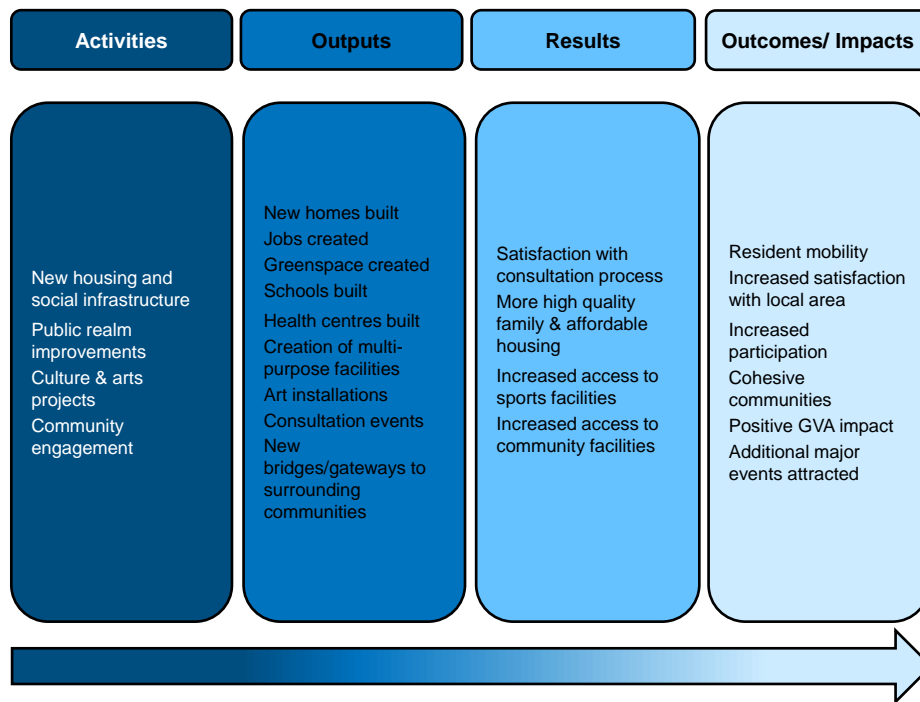
These improvements, coupled with wider connectivity improvements resulting from the development of the Olympic Park (such as the development of 30 new bridges and connections), are expected to improve accessibility for both future residents and visitors.

### 6.3 Transforming communities

The aim for this legacy sub-theme is that community transformation will occur through the construction of new homes, many of which will be affordable, and provision of new sport, leisure, education and health facilities that will meet the needs of residents, businesses and elite sport.

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for this sub-theme. The focus of the logic model is on those indicators where most progress has been made to date.

**Figure 6-8: Transforming communities summary logic model**



#### (i) Legacy programmes and initiatives

As with the previous sub-theme the delivery of this sub-theme has centred on a limited number of programmes and initiatives. These have been:

- The provision of new housing and social infrastructure on the Olympic Park site. This programme is being led by the LLDC in its role as custodian of the Olympic Park after the 2012 Games;
- Public realm improvements that, in addition to those noted above, will see the creation of new open space and the improvement to waterways. Again this work is primarily being led by the LLDC;
- A number of local legacy projects in culture and the arts including for example 'Art in the Park', which is an initiative led by the ODA to commission local artists to create new art in the public realm within the Olympic Park and its surrounding area.

#### (ii) Evidence available: Outputs & expenditure

In its role as custodian of the Olympic Park the LLDC has developed a comprehensive programme of activity through which it aims to:

- Deliver social, economic and environmental benefit and convergence for East London;
- Deliver financial returns to the public purse over the long term;

- Optimise sustainability and success of the Park and venues.<sup>198</sup>

Given these objectives, much of its activity therefore falls within this sub-theme and in particular the provision of new homes and social infrastructure. Below we provide an overview of the investment and expected outputs of the LLDC's activities within this sub-theme. However, it is important to note that the exact corporate measurement processes are still to be worked out, as are the actual targets (not least as negotiations with development partners are on-going). Therefore, the figures noted below should be seen as illustrative of the likely scale of expenditure and outputs. The other important point to note is that while some of these outputs will begin to be delivered from 2012 and immediately after the Games, many of them will be delivered over a much longer timescale from 2015 onwards with some of the final outputs not realised until 2030.

**Figure 6-9: Public expenditure on transforming communities**

Legacy programme/ initiative	Lead Organisatio n	Budget (£m)	Actual (£m)	Time period
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New housing and social infrastructure on OP*	LLDC	£262.7	N/A	2012 onwards
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Note: \* This includes expenditure on new housing, social infrastructure, the conversion of the IBC/MPC and land assembly

Based on this investment, and noting the earlier caveat, it is apparent in headline terms that the LLDC's activity within this sub-theme is intended to result in the:<sup>199</sup>

- Creation of 6,870 new homes, of which 35% would be affordable and 42% family homes;<sup>200</sup>
- Creation of over 4,000 new jobs (excluding construction), of which 75% are estimated to be for residents of the host boroughs, with 35% for BAME residents;
- Creation of over 2,000 construction jobs, of which 25% are estimated to be for 'local' residents;
- Creation of 102 hectares of open space and 45 hectares of bio diverse habitat;<sup>201</sup>
- Creation of two primary schools, one secondary school and nine nurseries;
- Creation of three health centres;
- Creation of a number of multi-purpose community, leisure and cultural spaces;
- Millions of visitors to the park and the venues that remain post-Games;
- A range of annual outputs relating to the Park, venues, events and regeneration programmes<sup>202</sup>.

In addition to the LLDC's programme of activity, another important programme for this sub-theme has been the ODA's 'Art in the Park' programme of permanent arts and cultural commissions. This programme has seen the development of a "*diverse range of projects*" ranging "*from bridges and underpasses designed by artists, to security fences, planting schemes, large-scale facades, as well as artist-led community projects in the six host boroughs*"<sup>203</sup>(see Appendix B for a brief summary of projects). The artists involved in this programme have ranged from local to internationally renowned. The figure below provides details of a selection of the different art work commissioned as part of this programme and in doing so it provides a sense of the breadth,

<sup>198</sup> LLDC (2012). Three Year Business Plan 2012/13 – 2014/15.

<sup>199</sup> See Appendix B for a detailed breakdown of the specific outputs associated with this sub-theme.

<sup>200</sup> This is in addition to the 2,818 additional homes provided as a result of the conversion of the Athletes Village.






<sup>201</sup> This includes 9.9ha of open space and 9.4ha of Biodiversity Action Plan habitat to be delivered specifically as a result of the Legacy Community Strategy and in addition to that created as a result the development of the Olympic Park for the purposes of the Games.

<sup>202</sup> These are shown in Appendix B and are supported by expenditure in the range of £10 million per annum in addition to the amount quoted in Figure 6-8 above

<sup>203</sup> ODA (2012). Art and culture in the Olympic Park: Art in the Park.

scale and variety of the different artwork that has been developed as a direct result of the 2012 Games.

**Figure 6-10: Selected projects delivered as part of the ODA commissioned Art in the Park programme**

	<p><b>Steles (Waterworks)</b>                  Artist: Keith Wilson                  Location: Waterworks Rivers</p> <p>Artwork that accentuates the main river that flows through the Olympic Park and connects the parkland with the river.</p> <p>During the Games and in legacy it will also be used for boat moorings</p>
	<p><b>RUN</b>                  Artist: Monica Bonvicini                  Location: Copper Box</p> <p>Flagship artwork comprising three 9 metre tall letters. The artwork is made of glass and stainless steel and in daylight the letters act as a mirror for visitors and their surroundings and at night they become more transparent and glow with internal LED lighting</p>
	<p><b>History trees</b>                  Artist: Ackroyd &amp; Harvey                  Location: Various around the Olympic Park</p> <p>10 semi-mature trees each supporting a large bespoke metal ring to mark the 10 entrances to the Olympic Park. Each ring is engraved on the interior face with text capturing the history of nine of the 10 locations. The tenth ring is engraved with resident recollections of the area</p>
	<p><b>Utilities building</b>                  Artist: Clare Wood (image) and DJ Simpson                  Location: South of the Olympic Park</p> <p>Two large-scale works integrated into the facades of two utilities buildings which will be highly visible in the legacy phase. Both artists have taken the landscape of the Park as their inspiration and are using materials which resonate with the industrial heritage of the site</p>
	<p><b>Winning Words</b>                  Artist: Various (image is Carol Ann Duffy and Stephen Raw)                  Location: Various (image is Eton Manor)</p> <p>A programme of permanent poems throughout the Park including both commissioned poems for the Park and existing poems nominated by the public. The poem in the image commemorates the history of Eton Manor</p>

Source: Images and text from the ODA.

**(iii) Evidence available: Evaluation and research**

To date there have been no formal evaluations undertaken of the programmes within this sub-theme, largely because much of it has yet to be delivered. However, the Institution of Civil Engineers (ICE) has written a suite of papers that focus on different aspects of 'Delivering London 2012', two of which provide useful insight into some of the issues related to this sub-theme.

The first is 'Delivering London 2012: parklands and waterways'<sup>204</sup> which provides insight into the situation prior to the award of the Olympic Games. It notes that the area in question was "*largely derelict, polluted, inaccessible and prone to flooding*", before concluding that as a result of the Games the following has been achieved with regard to the Olympic Park's parklands and waterways:<sup>205</sup>

- Seamless parkland and restored waterways;
- Integrated water management comprising sustainable urban drainage, water capture, cleaning and reuse, flood risk management, water demand reduction, habitat creation and non-potable networks;
- Invasive weed eradication;
- Habitat and species relocation, collection of seeds and plant cutting prior to demolition;
- Perennial meadows used extensively to create habitats and parklands;
- The Landscape Institute's 2009 Peter Youngman award for outstanding contribution to landscapes.

The second paper: 'Delivering London 2012: master planning'<sup>206</sup> summarises the development of the three master plans that guided the delivery of the Olympic Park. In doing so, the paper highlights the extent to which the plans for the Olympic Park were developed in conjunction with the local community noting that the 'initial master plan' in 2004 was shaped by "over 500,000 questionnaires" and "70 public consultation events held in an around the Lower Lea Valley" with the intention being to "*ensure that the overall master plan was tuned to local conditions and needs while still meeting regional requirements and the specific demands of the IOC in terms of transport, sustainability, security, environmental issues and legacy benefits*".<sup>207</sup>

An important source of primary research evidence for this theme as a whole is the host boroughs resident survey. This survey was specifically commissioned to inform this evaluation as it sought to gather information of the views, behaviours and attitudes of the residents in the six Olympic host boroughs. The survey was conducted between February and April 2012, with 1,320 responses received (see Appendix C for fuller details of the survey methodology along detailed analysis of the results).

This survey provides valuable evidence into the impact of the 2012 Games in transforming East London. It offers insight into resident mobility, perceptions of the area, community cohesion and satisfaction with the Olympic Park legacy plans and the consultation process for the Olympic Park master plans.

Resident mobility

The majority of respondents (75%) had lived in the same East London borough for more than 5 years, although this headline figure did vary between the individual boroughs with respondents in Newham and Tower Hamlets appearing more 'mobile' than those in Barking and Dagenham and Greenwich. Nearly one-third of the respondents in Tower Hamlets (32%) and Newham (30%) had moved into the borough within the last five years compared to only a fifth in Greenwich (18%) and Barking and Dagenham (22%). A pattern of variation that is further supported by the fact that 20% of respondents resident in Newham, and 19% resident

<sup>204</sup> ICE (2011). Delivering London 2012: parklands and waterways. Published in Civil Engineering 164.

<sup>205</sup> ICE (2011). Delivering London 2012: parklands and waterways. Published in Civil Engineering 164.

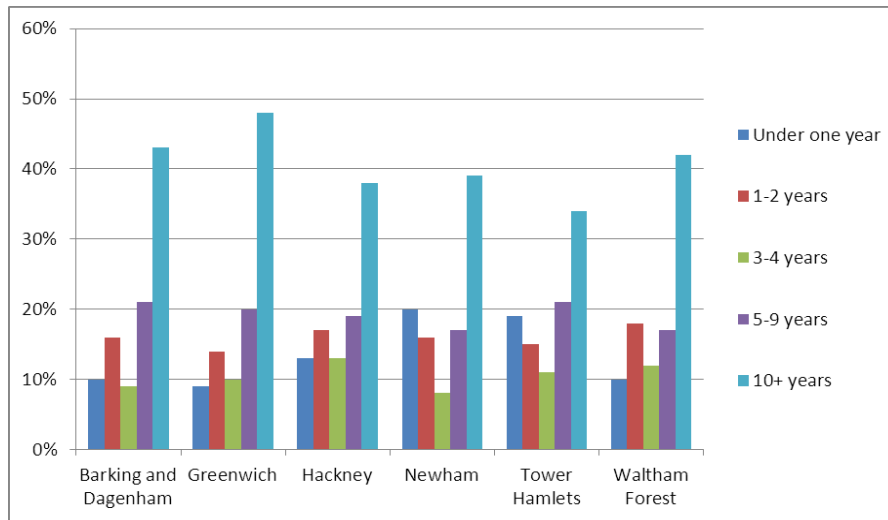
<sup>206</sup> ICE (2011). Delivering London 2012: master planning. Published in Civil Engineering 164.

<sup>207</sup> ICE (2011). Delivering London 2012: master planning. Published in Civil Engineering 164.



in Tower Hamlets had lived at their current address for less than a year, while the corresponding figures for Barking and Dagenham and Greenwich were 10% and 9% respectively.

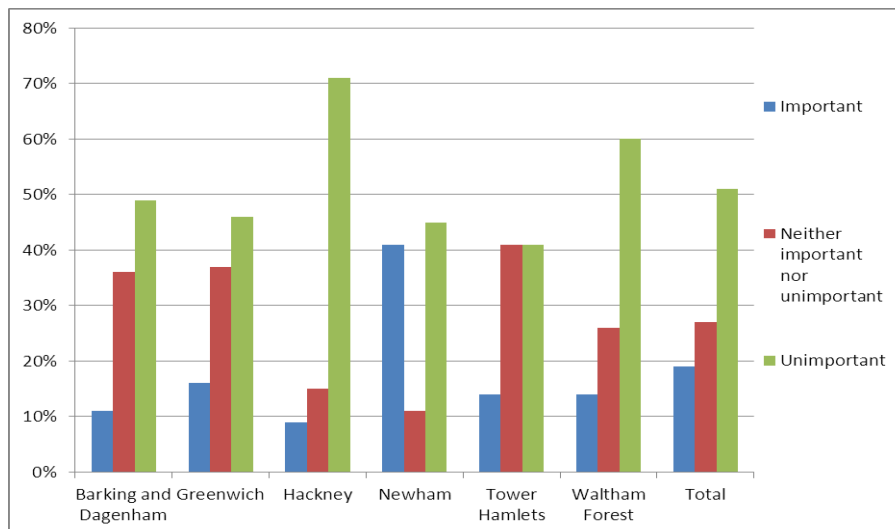
**Figure 6-11: Length of time at current address – host boroughs**



Source: Host boroughs resident survey.

The respondents who had moved into the borough they currently live in within the last 5 years were asked how important the regeneration of the area as a result of the 2012 Games was in making them decide to move to the borough. Although only based on a small sample of responses, a fifth (19%) felt that it was 'important' with 51% saying that it was 'unimportant'. This pattern was broadly reflected across the host boroughs with the exception of Newham where 41% of respondents felt that the regeneration resulting from the Games was 'important' in their decision to move into the area.<sup>208</sup>

**Figure 6-12: Importance of regeneration in decision to move into Borough**



Source: Host boroughs resident survey.

Interestingly, of those who felt that the 'regeneration of the area was important' in their decision to move to the borough, 52% had lived in the area for less than a year. Although only based on a very small sample of responses, this finding may suggest that as the regeneration effects of the Games have become more visibly apparent they have yielded a bigger influence on people's decision making with regard to moving into the area.

<sup>208</sup> Owing to the small sample sizes involved the confidence interval for this finding is +/- 14% at the 95% confidence level.

For those who felt that the regeneration effects of the Games were an 'important' factor in their decision making, the three most commonly cited factors were the improvements to infrastructure/facilities that had resulted (20%); the role the Games played in increasing money/revenue/business and being generally good for the economy (17%); and the transport improvements that had resulted (14%).

The question of resident mobility is an important one, particularly so in assessing the extent to which community transformation and convergence (see section 6.5) in East London have genuinely occurred and are additional, as opposed to being the result of new higher skilled, better paid and healthier people moving in and squeezing out the lower skilled, poorer and less healthy residents. It is an issue that is common to many large scale regeneration projects and it is argued by many that flagship regeneration projects do contribute to displacing existing residents and creating new divisions within areas.

The evidence currently available on mobility is, however, limited in terms of the depth in which it explores the issue, the timescales it covers and the cross-sectional nature of the data available. The latter issue is particularly important. For instance, the survey results show that the majority of respondents (75%) had lived in the same East London borough for more than 5 years suggesting that resident mobility is fairly low. However, to make firm conclusions this figure would need to be compared to other London boroughs which may have a higher or lower rate. This data is not available as the East London survey did not cover local authorities outside the host boroughs.

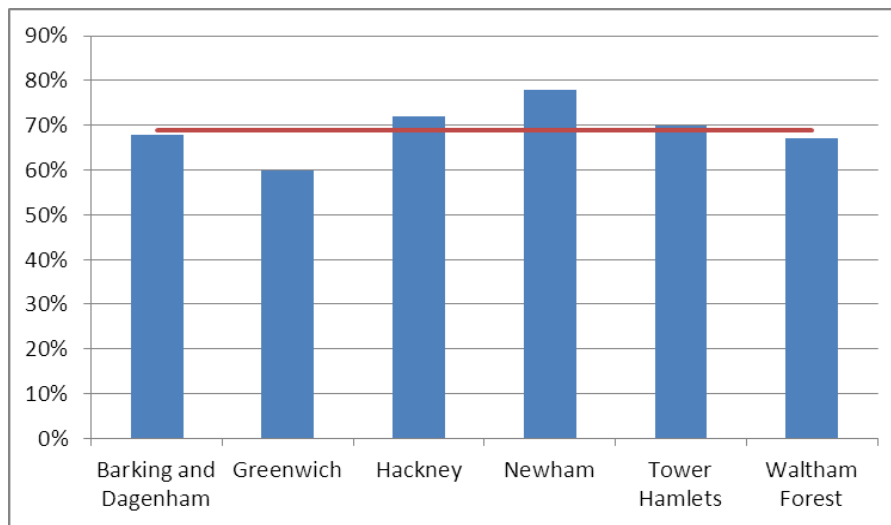
The issue is further complicated by the significant growth in population in the host boroughs which has been much higher than the London average, with resident population rising from 26.4% in Tower Hamlets, 23.5% in Newham and 18.9% in Hackney for example compared to the London average of 12%. The mobility issue will be explored in more depth in Report 5, particularly the extent to which the Games have impacted on property prices which is a key driver in mobility.

#### Perceptions of the area

When asked whether they thought that the 2012 Games would be good for London as a whole, based on what they had seen or heard, two-thirds (69%) of respondents felt that it had with 37% 'strongly agreeing'. This headline view was broadly reflected across the different age groups, genders and working status, although in terms of ethnicity, non-white respondents (75%) were notably more positive than 'white' respondents (66%). Given that this survey was undertaken before the Games had taken place, and following a period of disruption (due to Games preparation activities) with little realisation of the longer-term benefits of the Games, this can be seen as a positive finding.

Across the six host boroughs opinions varied more significantly with residents of Barking and Dagenham and Greenwich generally less positive than those in Newham (20% and 23% respectively, disagreed that the Games would be good for London compared to 11%).

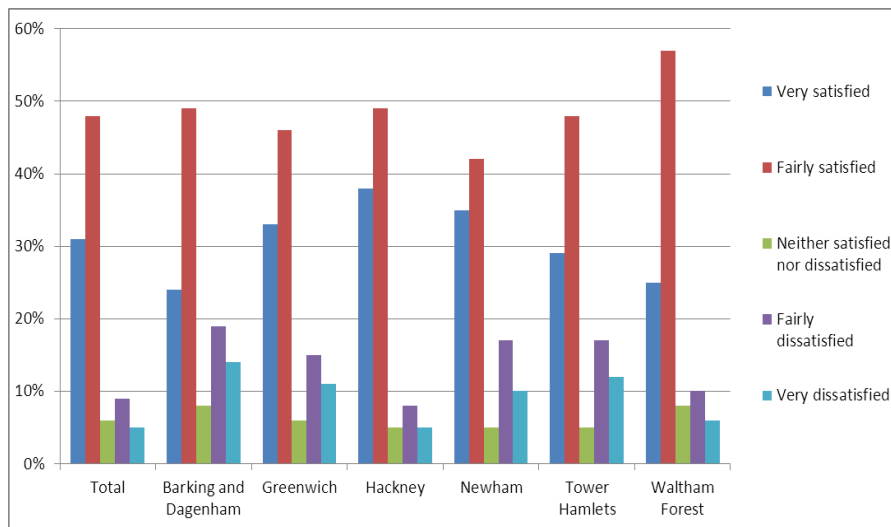
**Figure 6-13: Proportion of respondents 'agreeing' that hosting the 2012 Games would be good for London as a whole**



Source: Host boroughs resident survey.  
 Note: Red line shows the total for all respondents.

Over three-quarters (79%) of respondents were satisfied with their local area as a place to live, a third of whom (31%) were 'very satisfied'. Only 5% of respondents were 'very dissatisfied' with their local area as a place to live. This finding compares<sup>209</sup> favourably with DCLG's 2008 Place Survey which found that across the host boroughs resident satisfaction with their area as a place to live was 65%, a finding that at the time was notably lower than the London average of 75%.<sup>210</sup>

**Figure 6-14: Respondent satisfaction with their local area as a place to live**



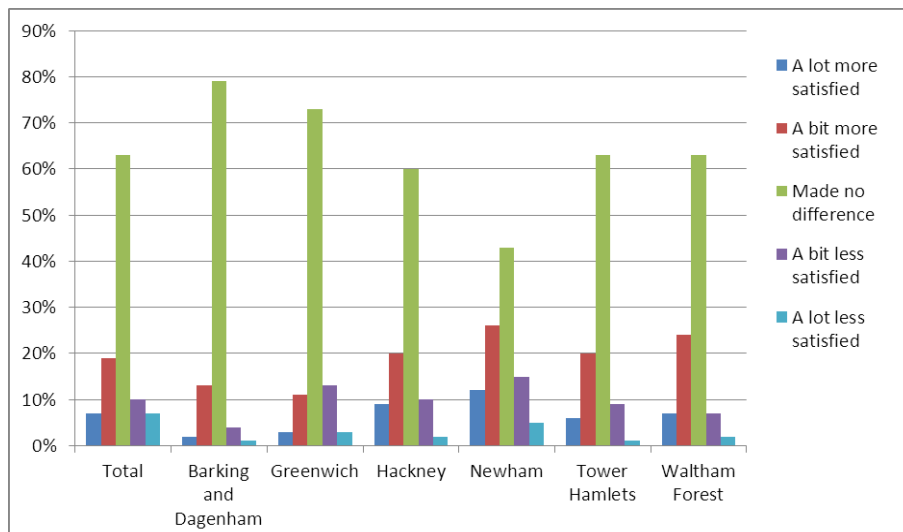
Source: Host boroughs resident survey.

A quarter (26%) of the respondents felt that hosting the Games had made them more satisfied with their area as a place to live, 10% felt that it had made them less satisfied and the majority (63%) felt that it had made no difference. Respondents who lived in Newham were more positive than those in the other host boroughs with 39% stating that hosting the Games had made them more satisfied with their area as a place to live.

<sup>209</sup> It should be noted that this is an imperfect comparison owing to the fact that the results are taken from different surveys which will have been undertaken using different methodologies.

<sup>210</sup> DCLG (2008). Place Survey.

**Figure 6-15: Extent to which hosting the Games has made respondents more satisfied with their area as a place to live**

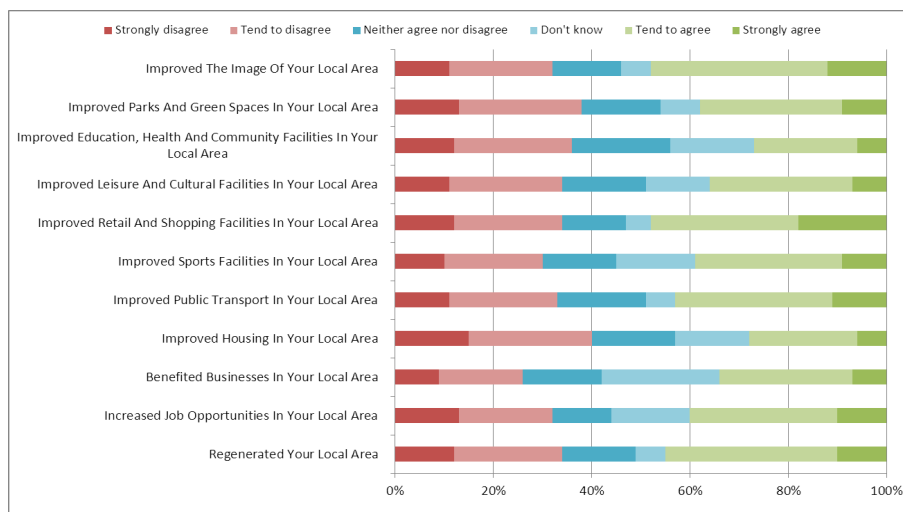


Source: Host boroughs resident survey.

Respondents were asked to comment on the extent to which the preparations for the 2012 Games have already impacted on local neighbourhoods in terms of the positive impacts. Respondents were fairly evenly split, between those that 'agreed' that the Games had already had a positive impact and those that 'disagreed' (see Figure 6-16), with no one position supported by more than half of the respondents. With this caveat noted, the three most significant impacts in the local area to date appear to be improvements to:

- Retail and shopping facilities (with 48% of respondents agreeing, most likely because of the opening of Westfield and the fact that it is a tangible benefit);
- The image of the local area (48%);
- Public transport (43%).

**Figure 6-16: The extent to which the preparations for staging the 2012 Games have positively impacted the local area**

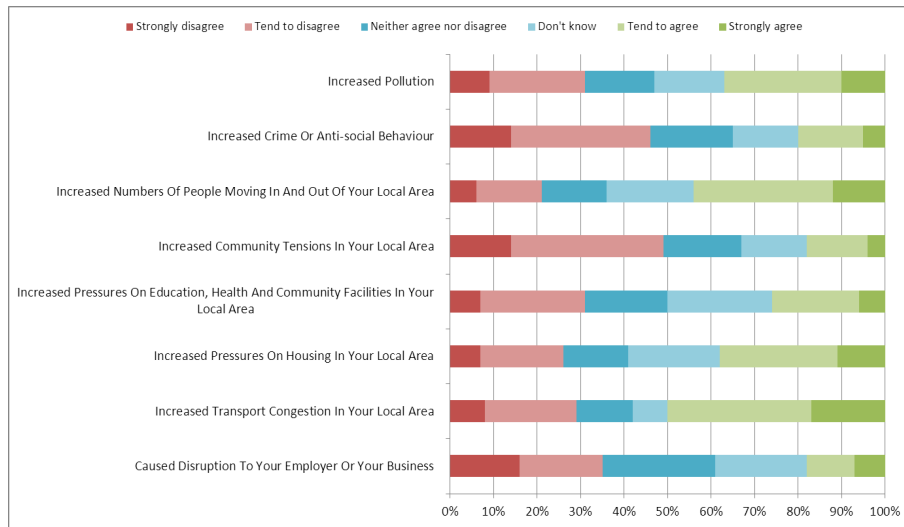


Source: Host boroughs resident survey.

In terms of the negative impacts to date, respondent views were again mixed (see Figure 6-17). Half of the respondents agreed that the preparations for staging the Games had increased transport congestion in the area (50%) and 44% felt that the Games had increased the numbers of people moving in and out of the area (a perception that is not supported by the questions

about mobility which suggest that three-quarters of the respondents had lived in the area for more than five years).

**Figure 6-17: The extent to which the preparations for staging the 2012 Games have negatively impacted the local area**



Source: Host boroughs resident survey.

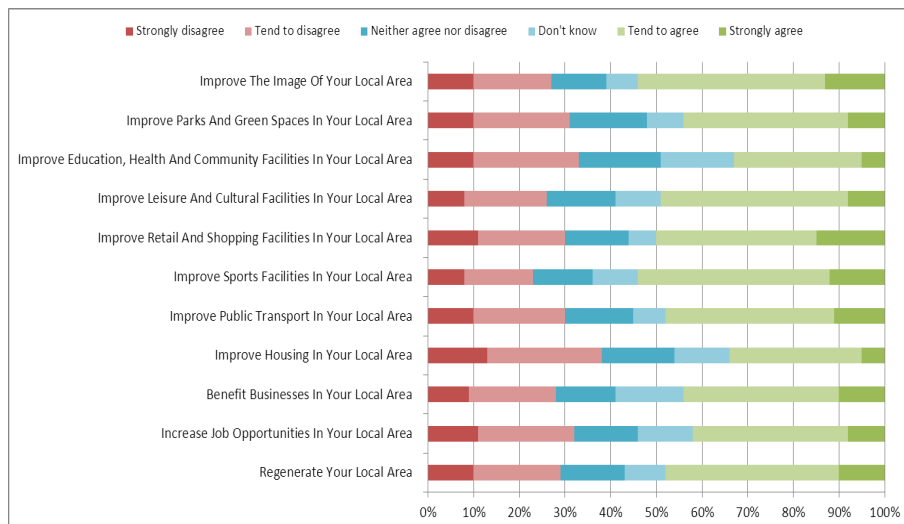
Thinking longer term, respondents were more positive (see Figure 6-18). Over half of the respondents 'agreed' that the long-term impacts of the 2012 Games will improve:

- The image of the local area (54%);
- Sports facilities in the local area (54%);
- Retail and shopping facilities in the local area (50%).

All of these suggest that respondents are aware of the potential future benefits arising from the transformation of the Olympic Park.

There were only two factors where more respondents disagreed than agreed and these were the extent to which the Games will improve housing in the local area (38% thought that it wouldn't compared to 34% who thought that it would) and the extent to which it will improve education, health and community facilities (where the same proportion of respondents at 33%, thought that it wouldn't as those who thought that it would).

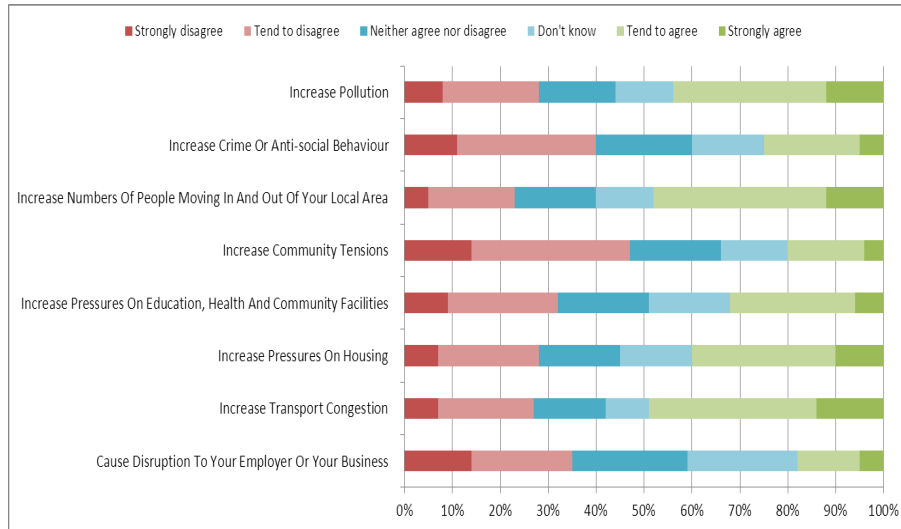
**Figure 6-18: The extent to which the 2012 Games will positively impact – over the longer term – on the local area**



Source: Host boroughs resident survey.

With regard to the negative factors, increased transport congestion (49%) (despite the implementation of significant improvements in local transport facilities) and increased numbers of people moving in and out of the area (48%) remained the two most common longer term concerns, with respondent views generally mixed across the remaining factors.

**Figure 6-19: The extent to which the 2012 Games will negatively impact – over the longer term – on the local area**

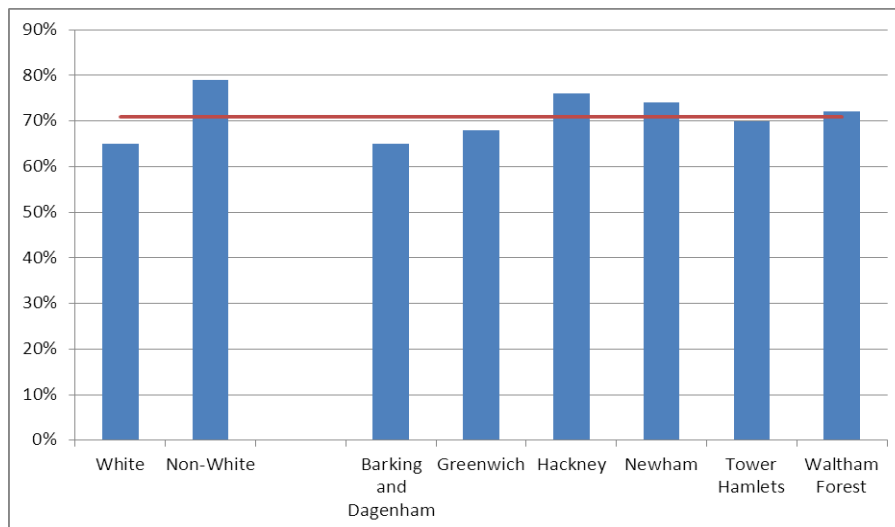


Source: Host boroughs resident survey.

Community cohesion

Seventy-one percent of respondents felt that they 'belonged' to their local area, a finding that was more true for non-white (79%) respondents than 'white' respondents (65%), and across the six host boroughs the figures ranged from 76% in Hackney to 65% in Barking and Dagenham.

**Figure 6-20: Proportion of respondents 'agreeing' that they 'belong' to the local area**



Source: Host boroughs resident survey.

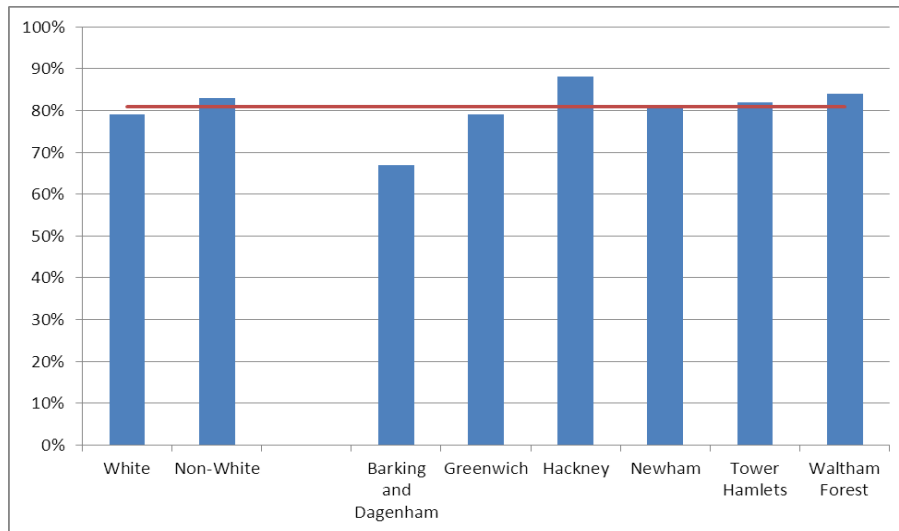
Note: Red line shows the total for all respondents.

Eighty-one per cent of respondents agreed that their local area was a place where people from different backgrounds 'get on well together', a view that was supported by both the 'white' (79%) and non-white (83%) respondents alike. It is a finding that again compares favourably with the results of the DCLG 2008 Place Survey which found that 67% of host borough

residents agreed that people from different backgrounds 'get on well together' (with a London average of 76%).<sup>211</sup>

However, there was again significant variation between the six host boroughs with a 21 percentage point difference between Hackney (the highest at 88%) and Barking and Dagenham (the lowest at 67%). This pattern was also apparent in the 2008 Place Survey where 49% of respondents in Barking and Dagenham and 77% of respondents in Hackney agreed that people from different backgrounds 'get on well together'.<sup>212</sup>

**Figure 6-21: Proportion of respondents 'agreeing' that people from different backgrounds get on well together**

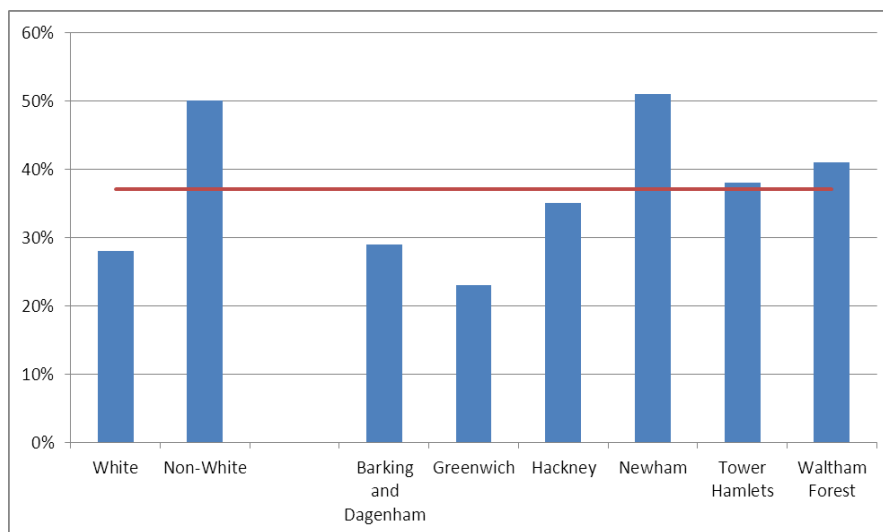


Source: Host boroughs resident survey.

Note: Red line shows the total for all respondents

Over a third (37%) of respondents agreed that the Games has made people from different backgrounds in their local area get on better, while the same proportion disagree. Again, there is a disparity of views across the host borough with respondents living in Newham more likely to agree (51%) and less likely to disagree (27%), as opposed to respondents living in Barking and Dagenham who were less likely to agree (29%) and more likely to disagree (49%).

**Figure 6-22: Proportion of respondents 'agreeing' that the 2012 Games has made people from different backgrounds get on better**



Source: Host boroughs resident survey. Note: Red line shows the total for all respondents.

<sup>211</sup> DCLG (2008). Place Survey.

<sup>212</sup> DCLG (2008). Place Survey.

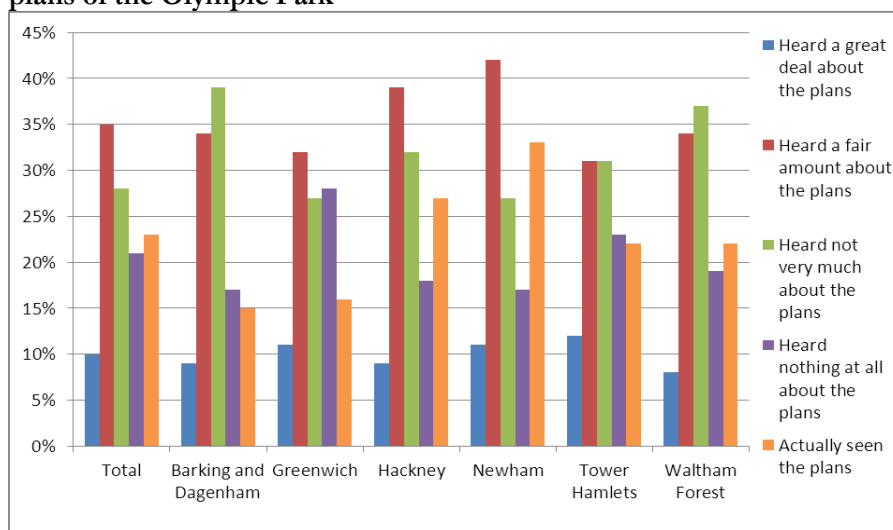
When asked about a series of specific community issues (eg vandalism, graffiti, rubbish, litter, noisy neighbours) the majority of respondents did not view them as a problem in the local area and perhaps more significantly, an overwhelming majority of respondents felt that the preparations for hosting the 2012 Games had made no difference to these problems in the local area.

*Satisfaction with Park legacy plans and the consultation process for Park Master Plans*

Just under half of the respondents (45%) had heard about the plans to improve the Olympic Park and the surrounding area a 'great deal' or a 'fair amount', but only a quarter (23%) of respondents had actually seen the plans to improve the Olympic Park area. A fifth of respondents (21%) had heard 'nothing at all'.

A larger proportion of respondents in Newham had seen the plans to improve the Olympic Park area (33%) than those who lived in Barking and Dagenham (15%) or Greenwich (16%). This is also reflected in the fact that 53% of the respondent who live in Newham had heard a 'great deal/a fair amount' about the plans compared to 43% in both Barking and Dagenham and Greenwich. It is a finding that is most likely and simply explained by the proximity of the Olympic Park to these two boroughs.

**Figure 6-23: The extent to which respondents that had heard about – and seen – the plans of the Olympic Park**

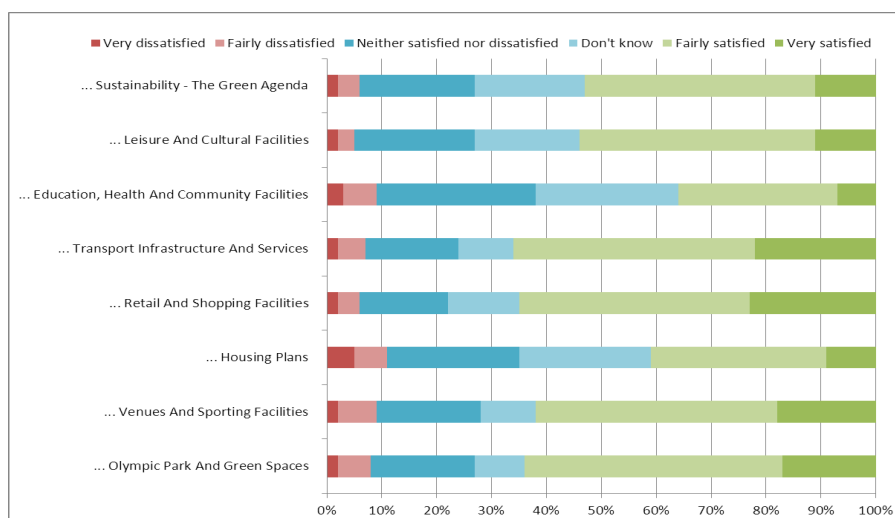


Source: Host boroughs resident survey.

A quarter (23%) of the respondents are satisfied with the community consultation process on the plans for the Olympic Park and surrounding area and the opportunity to input their views, with 18% dissatisfied and 37% neither satisfied nor dissatisfied. The proportion of satisfied respondents rises to 40% for those who live in Newham and falls to 15% for those who live in Barking and Dagenham.

In terms of specifics, of those respondents who had seen the plans over half of them were satisfied with the plans for sustainability (53%), venues and sporting facilities (62%), retail and shopping facilities (65%), transport infrastructure and services (65%), leisure and cultural facilities (54%) and the Olympic Park and green spaces (64%). Less than 10% of respondents were dissatisfied with any aspects of the plans. Only 30% of respondents were satisfied with the plans for education, health and community facilities and 36% satisfied with the plans for housing, a finding that is consistent with respondent's views on the extent to which the 2012 Games will impact on these facilities in the local area (see Figure 6-15 above).



**Figure 6-24: Satisfaction with the plans for the Olympic Park and surrounding area after the Games**

Source: Host boroughs resident survey.

#### (iv) Conclusions: Outcomes and additionality

It is clear that the LLDC has developed a comprehensive programme of activity which if delivered as intended will see the development of a significant number of new homes (both affordable and family) as well as a number of high quality community and social facilities, including both primary and secondary schools and health centres across five new neighbourhoods. The scale and nature of this development, coupled with the transformation of the facilities developed for, and used during, the Games (such as the Athlete's Village, the Athletes Health Centre and the Operation Centre) has the potential to drive forward the transformation of the East London community, not least in bringing about the development of a number of additional new homes (a notable proportion of which will be affordable and family homes) and bringing forward a number of much needed community facilities.

The positive outcomes emerging from the transformation of the facilities developed for, and used during, the Games will begin to become apparent from as early as mid- to late-2013. This will include the conversion of the Athlete's Village and the delivery of 2,818 additional apartments and town houses – 1,379 of which will be social housing (managed by Triathlon Homes) with the remaining 1,439 (managed by Qatari Diar/Delancey (QDD)) providing a significant increasing in the availability of private sector housing stock. In addition to this, the Athlete's health centre will become a community health centre and the Operations Centre will become a new Academy (Chobham Academy). However, given that this transformation process has only just commenced with the completion of the Games, and with completion of the LLDC's activity not expected until post 2015 (at the earliest), the full extent of this activity on transforming the East London community remains to be seen.

The host boroughs resident survey does however provide some insight into the extent to which the Games have already contributed to transforming the community in East London. Through this survey, it appears that regeneration of the area was important for a notable proportion of those who had moved into the borough within the last year which suggests that as the regeneration effects of the Games have become more visible they are yielding a bigger influence on mobility.

The survey did however show that while there was generally a good level of support for the Games, with two-thirds of respondents thinking that the Games would be good for London as a whole. Notably, fewer respondents thought that hosting the Games had made them more satisfied with their area as a place to live (a quarter) or that it had helped make people from different backgrounds get on better (a third). Based on the views of survey respondents it would appear that to date the preparations for the 2012 Games have impacted most on improving retail and shopping facilities, improving the image of the local area and improving public transport.

These views may in part be a reflection of the fact that less than half of the survey respondents had heard much about the plans to improve the Olympic Park with only a quarter having actually seen them. It may also reflect the fact that at this stage (pre-Games) people have had to face a lot of disruption and not yet seen or experienced many of the benefits which may be associated with hosting the Games.

#### **(v) Progress in answering the research questions**

***How were the plans for the Olympic park and the surrounding area (including the Legacy Masterplan Framework) developed in conjunction with the local community, and to what extent did they reflect the needs and aspirations of different groups?***

In answering this research question the evidence currently available provides two slightly conflicting answers. On the one hand, evidence provided by the Institution of Civil Engineers notes the breadth and depth to which the local community were consulted around the initial master plan – with over 500,000 questionnaires returned and 70 public consultation events held. Something which, it concludes, ensured that the "*overall master plan was tuned to local conditions and needs*".<sup>213</sup> However, on the other hand, the survey of host borough residents suggests that a fifth of respondents had heard nothing about the Park legacy plans and the consultation process for Park master plans and three-quarters had not seen the plans. The result of which is that only 23% of respondents were satisfied with the community consultation process. Although it should be noted that satisfaction does rise to 40% for those who live in Newham which may in part explain this inconsistency. One possible explanation for this disparity could be the fact that those residents who moved into the area more recently (ie within the last five years) would have missed the consultation on the initial master plan which took place in 2004.

***To what extent have accessible new homes and leisure, education, health and community facilities been provided in and around the Olympic Park as a consequence of the Games and to what extent are local people actively making use of the new facilities provided?***

The short answer to this research question is that to date no new homes and leisure, education and community facilities have been provided on the Olympic Park. However, the longer answer is that it is currently too early to answer this question and that it may not be possible to fully answer until 2015 at the earliest.

The plans for the legacy uses of the Olympic Park do, however, suggest a significant level of development including in excess of 9,000 homes, three new schools, three new health centres and a number of community facilities as well as the Olympic venues themselves, which the LLDC expect to be used by millions of visitors a year (eg 2.1 million per year to the Olympic Park (excluding venues) and over 3.1 million per year to the stadium, aquatics centre and multi-use arena).

***What has been the impact of the Park and venues on the recreational habits of East London residents, and their awareness of biodiversity?***

Like the previous research question, it is too early to be able to answer this question. However, what is apparent is that the Games have already resulted in the transformation of a largely derelict, polluted and inaccessible site into an accessible area with seamless parklands, restored waterways and newly created bio-diverse habitats. With this part of the challenge already addressed, the outstanding part is to ensure that the area is used by East London residents.

***How has the transformation of the Olympic park and the surrounding area contributed to community cohesion, and what are the key lessons for the integration of existing communities?***

Based on the results of the host boroughs resident survey it is apparent that 71% of respondents felt that they 'belonged' to their local area and 81% agreed that their local area was a place where people from different backgrounds 'get on well together'. These views did however vary across the individual host boroughs with those in Hackney notably more positive than those in Barking and Dagenham. With regard to the extent to which the Games had helped make people from different backgrounds to get on better responses were mixed, a third thought that they had and a third thought that they had not. Interestingly residents in Newham

<sup>213</sup> ICE (2011). Delivering London 2012: master planning. Published in Civil Engineering 164.

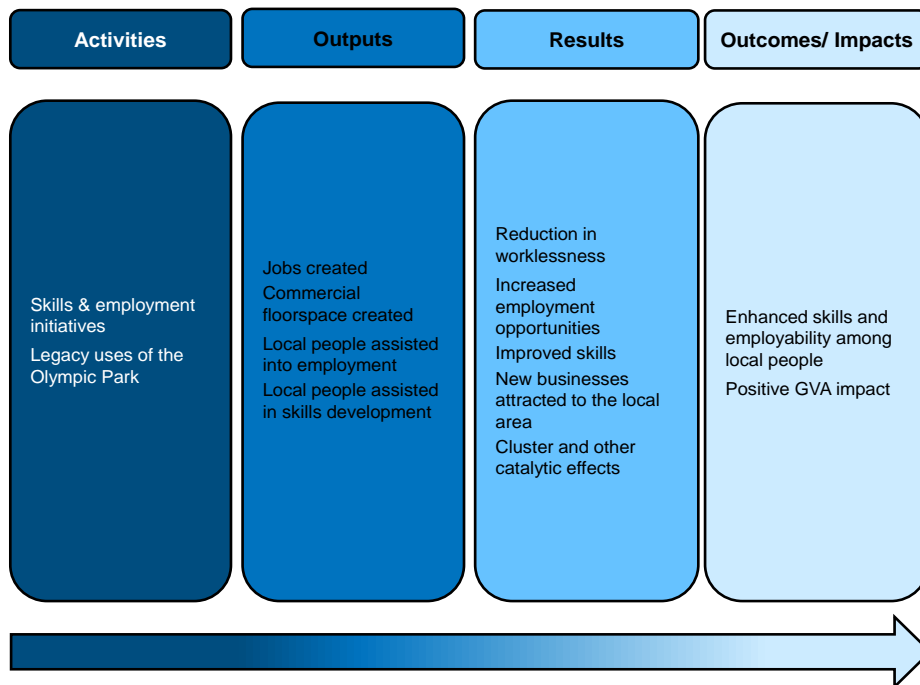
were more likely to think that they had and residents in Barking and Dagenham more likely to think that they had not. At this stage it is too early to comment on the lessons in relation to the integration of existing communities.

## 6.4 Transforming prospects

The focus of this sub-theme is on 2012 Games activities that have directly created employment along with wider initiatives designed to tackle worklessness and to maximise the employment opportunities generated by the Games legacy venues. The aim is for the Games to have helped thousands of workless Londoners from the six host boroughs into permanent employment by 2012 and to create new job opportunities in the Olympic Park post-Games. Given its focus there are close links with the employability and skills development sub-theme covered in the Economic legacy theme.

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for this sub-theme. The focus of the logic model is on those indicators where most progress has been made to date.

**Figure 6-25: Transforming prospects summary logic model**



### (i) Legacy programmes and initiatives

The legacy programmes and initiatives in this sub theme broadly fall into four groups of activity:

- The activities within the London Employment and Skills Taskforce (LEST) 2012 that are focused on or have benefited East London residents. This includes the Local Employment and Training Framework (LETF) which is a £9.6 million employment and skills project focused on developing skills, accessing work and supporting businesses within the six host boroughs, particularly in construction roles on the Olympic Park;
- A suite of 2012 Games-related activities delivered across the East London host boroughs to tackle worklessness and skills. This work is being coordinated through the Strategic Regeneration Framework (SRF) and its convergence target (see Section 6.5);
- The East and South East London City Strategy. This is a pilot scheme aiming to tackle workless and child poverty by engaging employers and other relevant agencies;

- The legacy uses of the Olympic Park. These are estimated to create a number of new employment opportunities, most of which will be through the conversion of the IBC/MPC into an employment hub focusing on high-tech and creative industries.

**(ii) Evidence available: Outputs & expenditure**

The output data currently available for this theme is split between two programmes of activity: worklessness and skills and legacy uses. The data on worklessness and skills is based on the ODA's Employment and Skills data which relates to the employment opportunities generated by the development of the Olympic Park and Athletes' Village. The data on skills and legacy uses has been provided by the LLDC and relates to the conversion of the IBC/MPC and the construction involved in transforming the Olympic Park from Games-time uses to legacy uses. Given that these outputs are generally the result of expenditure on construction activities, expenditure data is covered by the sums quoted in Figures 6-2 and Figure 6-8. The various caveats noted previously in relation to the LLDC data therefore also apply here and, in addition, a number of outputs are not yet known because they depend on the nature of the occupiers.

It should also be noted that expenditure and output data is available for the LEST 2012 programme, although, because it is only available for London as a whole it has been addressed in Chapter 4 rather than in the tables below.

**Figure 6-26: Transforming prospects outputs achieved**

Legacy programme/ initiative	Lead organ- isation	Total Outputs / KPI achieved	Units	Time period
Worklessness & Skills	ODA	29,750*	Workers for contractors on the Olympic Park	2008-2011
Worklessness & Skills	ODA	5,241 (17.5%)*	Workers for contractors on the Olympic Park who live in the host boroughs	2008-2011
Worklessness & Skills	ODA	10.2*	% of workers for contractors on the Olympic Park who were previously unemployed	2008-2011
Worklessness & Skills	ODA	79.3*	% of workers for contractors on the Olympic Park who were earning at least the London Living Wage	2008-2011
Worklessness & Skills	ODA	4%*	% of workers for contractors on the Olympic Park who were women	2008-2011
Worklessness & Skills	ODA	1.1%*	% of workers for contractors on the Olympic Park who were disabled	2008-2011
Worklessness & Skills	ODA	15%*	% of workers for contractors on the Olympic Park who were BAME	2008-2011
Worklessness & Skills	ODA	16,548*	Workers for contractors on the Athlete's Village	2010-2011
Worklessness & Skills	ODA	4,507 (27.2%)*	Workers for contractors on the Athlete's Village who live in the host boroughs	2010-2011
Worklessness & Skills	ODA	10.5%*	% of workers for contractors on the Athlete's Village who were previously unemployed	2010-2011
Worklessness & Skills	ODA	61.1%*	% of workers for contractors on the Athlete's Village who were earning at least the London Living Wage	2010-2011
Worklessness & Skills	ODA	2.7*	% of workers for contractors on the Athlete's Village who were women	2010-2011
Worklessness & Skills	ODA	0.5*	% of workers for contractors on the Athlete's Village who were disabled	2010-2011
Worklessness & Skills	ODA	13.3*	% of workers for contractors on the Olympic Park who were BAME	
Worklessness & Skills	LOCOG	12,458~	LOCOG Contractor Workforce resident in host boroughs	2008-2012
Worklessness & Skills	LOCOG	612 (20.1%)~	LOCOG Paid Workforce resident in host boroughs	2012
Legacy uses - New housing & infrastructure on OP	LLDC	4,421 #	No. new jobs created (over the 15 yr construction period, excl construction jobs)	2015 onwards
Legacy uses - New housing & infrastructure on OP	LLDC	2,621#	No. new construction jobs created (peak number of construction workforce estimated to occur in 2023)	2015 onwards
Legacy uses - conversion of the IBC/MPC	LLDC	3,500 #	No. new jobs created (over 5 years with phased occupancy of buildings)	2014 onwards
Legacy uses - conversion of the IBC/MPC	LLDC	91,000 #	Square metres commercial floorspace	2014
Legacy uses - conversion of the IBC/MPC	LLDC	-**	% employees from the 6 host boroughs	2014 onwards
Legacy uses - conversion of the IBC/MPC	LLDC	-**	% employees women, disabled or BAME	2014 onwards
Legacy uses - conversion of the IBC/MPC	LLDC	-**	% supply chain spend with local SMEs	2014 onwards
Legacy uses - conversion of the IBC/MPC	LLDC	-**	No. days training provided to SMEs with supply chain contracts	2014 onwards
Legacy uses - conversion of the IBC/MPC	LLDC	-**	% workforce with permanent residency (12 + months) in the host boroughs	2014 onwards
Legacy uses - conversion of the IBC/MPC	LLDC	-**	% employees to be paid London Living Wage as a minimum - Tier 1 and 2	2014 onwards

Note: \* Figures correct as of the 31 December 2011; ~ Figures correct as of 21 May 2012 and based on conditional job offers; # These figures are target outputs as opposed to achieved. \*\* LLDC currently in process of defining specific targets

In headline terms, this data shows that the demolition and build of the Olympic Park created in excess of 29,750 employment opportunities, 17.5% of which were for host borough residents. Building the Athlete's Village created 16,584 employment opportunities, 27% of which were for host borough residents. In addition, LOCOG has employed 612 host borough residents in paid work as well as employing 12,458 host borough residents in its Games-time contractor workforce in roles such as hospitality, catering, cleaning, security, retail, ticketing and logistics.

A further 3,500 jobs are expected to be supported through the employment space and facilities resulting from the conversion of the IBC/MPC and an estimated 2,600 construction jobs supported through the process of transformation. At this stage, the proportion of host borough residents benefiting from these opportunities is still to be agreed.

### **(iii) Evidence available: Evaluation and research**

A valuable and robust source of evidence for this subtheme is the beneficiary survey undertaken as part of the LDA evaluation of the LEST 2012.<sup>214</sup> This survey had responses from 2,009 beneficiaries of LEST 2012 funded initiatives, 668 of whom were resident in the five<sup>215</sup> host boroughs.<sup>216</sup> This survey found that:

- 37% of host borough beneficiaries had never been in paid work before, compared to 24% across London as a whole;
- Those living in the host boroughs were significantly more likely to know about the link between LEST 2012 and the 2012 Games, and that this link influenced their decision to participate. Nearly half (47%) of the beneficiaries in the five host boroughs who knew about the LEST 2012 link with the 2012 Games felt that this knowledge had 'a great deal' of influence over their decision to take part;
- 28% of host borough beneficiaries moved into employment following the LEST 2012 support, compared to 33% across London as a whole. This figure rises to 32% and 39% respectively when those who went onto paid employment or self-employment having first progressed into voluntary work are taken account of and those still receiving support are removed from the analysis;
- 22% of *all* beneficiaries (regardless of where they live) found employment in the host boroughs.

The LDA evaluation used the survey results to assess the overall economic impact of LEST 2012 up to March 2011 based on the LDA's Athena performance monitoring system. Through this analysis it was estimated that LDA funded LEST 2012 interventions had created a total of 6,090 jobs in the host boroughs, of which 1,909 were thought to be additional (ie would not have been created in the absence of the 2012 Games).<sup>217</sup> In monetary terms this was translated into a net salary outcome of £27 million and a net GVA impact of £54 million between 2006/07 and 2010/11 for the host boroughs.

Alongside the LDA's performance monitoring data the LEST 2012 Implementation Group also collected and reported employment outputs every quarter. This covered both LDA funded initiative and non-LDA funded LEST initiatives. Based on this data it was estimated that LEST 2012 had created between 8,663 and 10,151 jobs in the host boroughs (depending on the method used) and that this number could rise to between 9,112 and 10,600 if safeguarded employment was included<sup>218</sup> (ie those jobs that would otherwise have been lost had 2012 Games not happened).

<sup>214</sup> PwC and SQW (2011). London Development Agency: 2012 Games Legacy Impact Evaluation Study: Appendix B London Employment and Skills Taskforce for 2012 (Final Report).

<sup>215</sup> Due to the timing of the evaluation, Barking and Dagenham had not become part of the host boroughs and is therefore not included in the analysis.

<sup>216</sup> In terms of statistical robustness the survey had a London wide confidence level of +/- 2.1% at the 95% confidence level, and a confidence level of +/- 3.7% at the 95% confidence level for the five host boroughs.

<sup>217</sup> Through the survey PwC and SQW calculated that LEST 2012 had an 'additionality ratio' of 0.31 in the host Borough, this was marginally below the ratio for London as a whole of 0.32.

<sup>218</sup> The PwC and SQW work estimated that an additional 449 jobs were safeguarded in the host boroughs.

With a LEST 2012 milestone of a 10,286 reduction in worklessness in the host boroughs by 2010/11, these findings suggest that at worst good progress has been made (84% of target) and that at best, current progress in reducing worklessness was ahead of where it should be (103% of target).

Outside of the LEST programme, and looking towards the wider activities of the host boroughs in tackling worklessness, it is apparent through the Volterra economic impact study of Westfield that the Stratford City development had a positive impact on creating job opportunities for residents in East London. Although it is not possible to attribute all of this employment to the Games, it is apparent (see transforming place, section ii, evidence available) that the Games ensured that these opportunities were realised between 5 and 7 years earlier than would have been the case had the Games not been taking place in East London.

In terms of the scale of job opportunities created for East London residents, Volterra looked at both the construction jobs created as well as the jobs created through the day-to-day operation of Westfield, Stratford City.

- With regard to construction jobs, the Volterra study estimated that 20% of all construction jobs were in the East London area, which equated to between 5,000 and 5,400 jobs with associated construction earnings of between £105 million and £110 million.<sup>219</sup>
- Of the 10,000 permanent jobs created to operate Phase 1, around 3,000 have gone to local unemployed Newham residents.<sup>220</sup> This positive outcome is largely a result of the London Borough of Newham's job brokerage scheme and the Skills Place retail academy which delivered on a commitment from Westfield and its major retail anchors (John Lewis, Waitrose, Marks and Spencers and Vue cinema) to guarantee interview places for locally unemployed people living in Newham – something that was noted by Volterra to be an example of "*much needed effective employer engagement*".<sup>221</sup>

Based on these employment numbers, Volterra estimate that the creation of the employment opportunities in East London would also generate an annual welfare saving of almost £11 million (in addition to the positive economic impact generated by earnings).<sup>222</sup> It is a calculation that Volterra notes is also likely to underestimate the beneficial impact of getting unemployed people into work as it only captures the direct benefits of reducing the cost of welfare payments and does not "*capture the knock on benefits such as reduced crime, better health and education outcomes for the next generation*".<sup>223</sup>

Within the host boroughs residents survey, respondents were asked a series of questions around the role the 2012 Games had played in providing access to jobs. Just under half (45%) of the respondents agreed that the hosting of the 2012 Games in East London had increased the number of jobs available to local residents with 29% disagreeing. Interestingly, those respondents aged 16-24 were notably more likely to agree (60%) than those respondents in other age groups. Respondents who lived in Newham and Tower Hamlets were also more likely to agree (64% and 51% respectively) than those in Barking and Dagenham (32%) and Greenwich (36%). This finding may in part be explained by the proximity to the Olympic Park and Westfield, Stratford City as these two developments provided significant job opportunities.

<sup>219</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

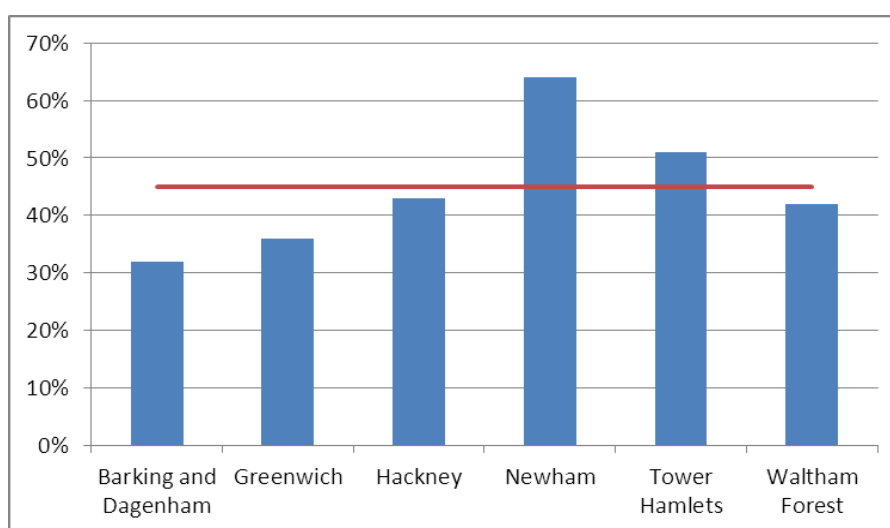
<sup>220</sup> London Borough of Newham.

<sup>221</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

<sup>222</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

<sup>223</sup> Volterra (2011). Westfield Stratford City: The Inheritance before the Games.

**Figure 6-27: Proportion of respondents 'agreeing' that the 2012 Games has increased the number of jobs available to local residents**



*Source: Host boroughs resident survey.*

*Note: Red line shows the total for all respondents*

That said, only 4% of respondents had directly (either personally (2%) or through members of their household (2%)) benefited from employment opportunities, lasting or due to last more than one year, resulting from the preparation of the Games: 2% on the Olympic Park; 1% in at Olympic venues and facilities; and 1% at Westfield, Stratford City.

4% of respondents also noted that they had benefited (either personally (2%) or through a member of the household (2%)) from employment opportunities related to the Games that have or are due to last for less than a year. Taken together these results suggest that 7% of respondents benefited, either personally (3%) or through someone in their household (4%), from employment opportunities related to the preparations for the 2012 Games.

Although based on a very small sample, of those respondents who had benefited (either personally or through a member of the household) from employment opportunities related to the Games:

- 38% noted that they needed to be trained in new skills;
- 79% were already in work, education or training;
- 16% were unemployed – 4% of whom were unemployed for more than six months and a further 5% who were unemployed for more than a year.

#### **(iv) Conclusions: Outcomes and additionality**

The overriding conclusion from the evidence available for this sub-theme is that activities related to the 2012 Games have either directly (eg the construction of the Olympic Park) or indirectly (eg employment at Westfield Stratford City) created a significant amount of employment opportunities, a notable proportion of which have helped workless Londoners from the six host boroughs into employment. It is not possible at this stage to sum the employment opportunities noted above to provide an overall figure due to the risk of double counting and the incompatibility of the figures. This evidence does, however, provide insight into both the scale of employment opportunities created, which are likely to be in the tens of thousands, as well as the extent to which they can be considered additional. The LDA evaluation estimates for the LEST 2012 employment opportunities to be about 1 in 3 (ie for every three jobs created by LEST 2012, one would not have existed in the absence of the Games).

It is also apparent, through the intended plans of the LLDC, that a significant number of employment opportunities are still to be created both through the transformation of the Olympic Park (which will mainly be in construction) and the longer term legacy uses of the



Olympic Park (which will include the creation of employment land resulting from the conversion of the IBC/MPC, the management and operation of the venues and the staffing of the community and social facilities). These latter opportunities are particularly pertinent to this sub-theme as they are likely to be sustained opportunities, as opposed to time-limited; at a range of different skill levels including higher skilled; and across a range of different sectors (hi-tech, sport and leisure, education and health).

**(v) Progress in answering the research questions**

*To what extent did the preparation for and staging of the 2012 Games create job opportunities for more local residents (including in particular disadvantaged and disabled residents), and how was this supported?*

The evidence available suggests that the preparation for and staging of the 2012 Games did create a large number of job opportunities for local residents:

- ODA data shows that 5,241 host borough residents were employed in the demolition and build of the Olympic Park with a further 4,507 employment opportunities created by the building of the Athlete's Village as of December 2011.
- LOCOG has employed 612 host borough residents in paid work as well as employing 12,458 host borough residents in its Games-time contractor workforce in roles such as hospitality, catering, cleaning, security, retail, ticketing and logistics (as of May 2012).
- LEST 2012 suggest that between 8,663 and 10,600 jobs were created in the host boroughs by March 2011 (depending on the method used)
- Information on the construction and operation of Westfield, Stratford City estimates that between 5,000 and 5,400 host borough residents were employed in its construction with around 3,000 Newham residents employed in its operation (a figure which is likely to increase if all host boroughs were included).

This activity appears to have been supported by three broad types of activity: contractual requirements on development partners; employer engagement programmes; and programmes and activities to support workless individuals in accessing employment.

In terms of disabled residents the ODA data shows that as of December 2011, 327 disabled people had been employed in the demolition and build of the Olympic Park (1.1% of all employees), and 83 disabled people had been employed in the building of the Athlete's Village (0.5% of all employees). It should be noted that this was below the benchmark target of 3% and that while these jobs were located in East London the evidence is not available to comment on whether the employees lived locally.

*To what extent has the transformation of the Olympic Park, legacy venues and local image encouraged business investment in the Park and surrounding area, creating at least 8,000 new jobs across a range of sectors (including in hi-tech and sport and leisure, tourism and cultural industries), and how was this supported?*

With the transformation of the Olympic Park not due to commence until late 2012, and with impacts not expected until 2014 at the earliest, it is too early to be able to answer this research question. However, based on the plans of the LLDC it is apparent that it intends to deliver activities at the scale required to achieve this level of transformation.

*To what extent have training, work experience and volunteer schemes associated with the 2012 Games contributed towards local people moving into employment beyond the Games?*

For a number of the pan-London programmes delivered as part of LEST 2012, work experience and volunteering were key element to their approach and integral to help move workless Londoners into employment. One example of this is the Personal Best programme which used volunteering and the excitement generated by the opportunity to become a 2012 Games-time volunteer, to improve the level of employability of London's workless population, while another is the 2012 Games-related Sector Training Programme which involved the provision of training relevant to 2012 Games-related activities, with a particular focus on: customer service, media and communications, language and cultural awareness, and green skills.

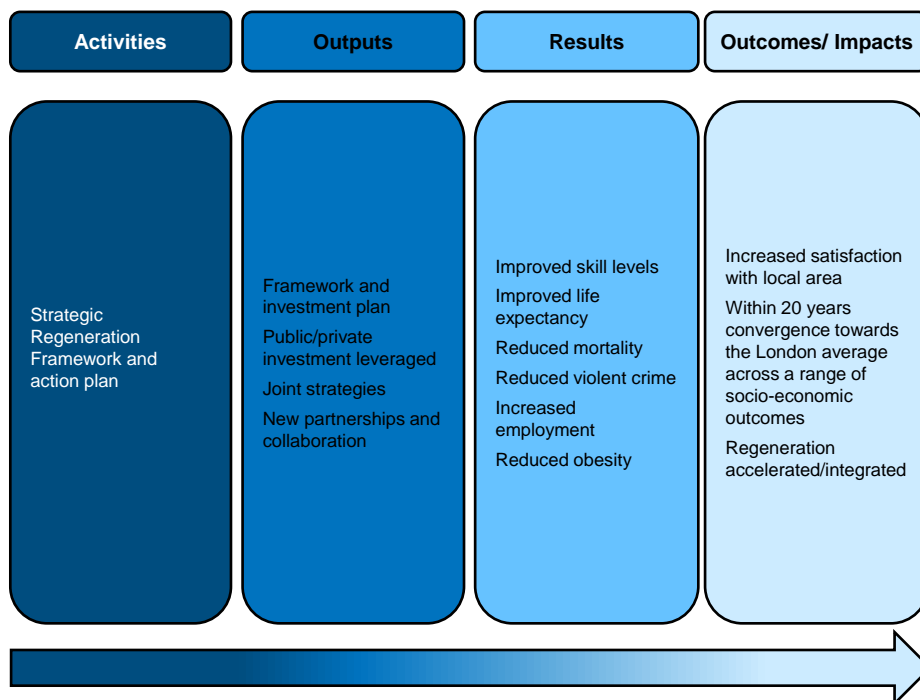
It is estimated that 5% of unemployed host borough beneficiaries found employment having first progressed into voluntary work.

## 6.5 Convergence

This final sub-theme is in effect an amalgamation of all the activities covered by the other three sub-themes as it has at its heart the overarching objective that: "*within 20 years, the communities which host the 2012 Olympic and Paralympic Games will enjoy the same social and economic chances as their neighbours across London*".<sup>224</sup> It was an objective which Oxford Economics estimated could see the host boroughs producing an additional £6.5 billion GDP per year by 2030.<sup>225</sup>

The logic model below provides a summary of the activities, outputs, results, outcomes/impacts for this sub-theme. The focus of the logic model is on those indicators where most progress has been made to date.

**Figure 6-28: Convergence summary logic model**



### (i) Legacy programmes and initiatives

The activity within this sub-theme is encapsulated by the SRF that was first published in 2009. The SRF was an "*expression of the host boroughs determination to use the 2012 Games as a catalyst to reduce poverty and transform the environment for the benefit of [all] citizens*".<sup>226</sup> Its activity is currently guided by a framework and action plan for 2011-2015.<sup>227</sup> This framework and action plan groups activities under the three themes of:

- Creating wealth and reducing poverty;
- Supporting healthier lifestyles;
- Developing successful neighbourhoods.

For each of these themes the host boroughs have grouped a number of key activities which are shown in Figure 6-29.

<sup>224</sup> Host Boroughs (2009). Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs.

<sup>225</sup> Oxford Economics (2010). Six Host Boroughs Strategic Regeneration Framework – Economic Model.

<sup>226</sup> Host Boroughs (2009). Convergence, Strategic Regeneration Framework, An Olympic legacy for the host boroughs.

<sup>227</sup> Host Boroughs (2011). Convergence Framework and Action Plan.

**Figure 6-29: Key convergence activities 2011-2015 by theme**

**Creating wealth and reducing poverty**

- To ensure that the Work Programme<sup>228</sup> is effectively delivered and supports Convergence
- To maximise the Olympic employment legacy
- To maximise the inward investment legacy
- To develop partnership architecture with employers and training providers to support achievement of Convergence outcomes
- To increase the levels and relevance of qualifications of host borough residents

**Supporting healthier lifestyles**

- To give the children of the host boroughs the best start in life
- To reduce the number of people dying prematurely from preventable causes
- To reduce the number of people whose health affects their ability to secure or maintain work
- To increase physical activity and social capital through changes in the built environment
- To increase sports and physical activity participation especially in sports benefiting from a facility legacy from the 2012 Games
- To use Olympic and Paralympic momentum to motivate, raise aspirations and promote cultural activity

**Developing successful neighbourhoods**

- To develop partnership arrangements for the developing successful neighbourhoods theme
- To reduce levels of violent crime and gang activity
- To complete the Olympic public realm improvements programme and secure the legislative changes necessary for more effective environmental enforcement
- To increase the number of affordable homes and reduce overcrowding
- To deliver new city districts with a range of accessible and high quality facilities

Sitting behind each of these activities is a detailed action plan with clear ownership and timeframe for delivery.

**(ii) Evidence available**

For each theme there is also a clear set of measures, based on secondary data sources, that allow for a regular and comprehensive assessment of progress, both in terms of actual improvement against a 2009 baseline, but also – perhaps more significantly – in comparison to the rest of London. The most recent assessment of progress was made in May 2012, using the latest available data. Given its timeliness, this is an extremely valuable source of evidence for this sub-theme.

Based on the progress made by 2010/11, looking at both the performance against the baseline and the comparison with London as a whole, the Host Borough Unit has made a summary assessment for each of the 21 indicators reviewed. Drawing on this assessment of progress it is possible to group the indicators into four categories. This is shown in Figure 6-30.

<sup>228</sup> A major new payment-for-results welfare-to-work programme that launched throughout Great Britain in June 2011.

**Figure 6-30: Progress by 2010/11 on convergence indicators**

'Gap' reduced – Convergence on track	'Gap' reduced slightly – Convergence not on track
<ul style="list-style-type: none"> <li>• 19 year olds achieving NVQ level 2 threshold</li> <li>• % of working age population with no qualifications</li> <li>• Proportion of children in working age families receiving key benefits</li> <li>• Pupils achieving at least Level 4 in English &amp; Maths at Key Stage 2</li> <li>• Pupils achieving 5 GCSE grades A*-C in maintained schools</li> <li>• 19 year olds achieving NVQ Level 3 threshold</li> <li>• Life expectancy – male</li> <li>• Life expectancy – female</li> <li>• % of children achieving a good level of development at age 5</li> <li>• Mortality rates from all circulatory diseases at ages under 75</li> <li>• Recommended Adult Activity (3 times 30 minutes per week)</li> <li>• Violent crime levels</li> </ul>	<ul style="list-style-type: none"> <li>• Employment rate – aged 16-64</li> <li>• Unemployment rate 16+</li> <li>• Working age population qualified to at least NVQ Level 4</li> <li>• Obesity levels in school children in year 6</li> <li>• No sport or activity (0 times 30 minutes per week)</li> </ul>
Gap increased – Convergence not on track	New indicator – progress tracked from 2012/13
<ul style="list-style-type: none"> <li>• Median earning for full time workers living in the area</li> </ul>	<ul style="list-style-type: none"> <li>• Improved street and environmental cleanliness</li> <li>• % of households defined as overcrowded</li> <li>• Overall satisfaction</li> </ul>

Based on this analysis it is apparent that for 12 of the indicators the gap with the rest of London is closing and that the host boroughs are on track to achieve convergence by 2020. For example:

- The proportion of 19 year olds achieving NVQ Level 2 threshold has increased from 73.6% to 81% and closed the gap with the rest of London from 4.4% to 2.4%;
- The proportion of children achieving a good level of development at age 5 has increased from 48.7% to 55.2% and closed the gap with the rest of London from 6.0% to 4.3%;
- The rate of violent crime has fallen from 28.9 per 1,000 population to 24 per 1,000 population and closed the gap with the rest of London from 6.1 to 4.3.

For a further five indicators the gap with the rest of London has closed, but not significantly enough to date, for example the gap in the employment rate has reduced from 5.5% to 4.8% but the target for 2014/15 is to have narrowed the gap to 2-3%. There are three indicators for which the data is yet to be collected and only one that is 'not on track': the gap in terms of median earning for full time workers living in the area has increased from £38.70 in 2009 to £39.40 in 2011.

It is also worth noting that each of the themes uses one of the 21 indicators as its 'key measure', with two of the three currently on track so far. The key measure for:

- Supporting healthier lifestyles is 'life expectancy' for men and women, of which both are currently on track;
- Developing successful neighbourhoods is 'violent crime levels' which is on track;
- Creating wealth and reducing poverty is the 'employment rate' which is currently *not* on track.

Since this assessment was carried out data from the 2011 census has been released which provides more accurate population figures. It shows a substantially larger population than previous estimates with an additional 174,000 residents across the six host boroughs compared

against the 2010 mid-year population estimate provided by ONS. This may have a substantial impact on the calculation of some convergence indicators and will need to be explored further in Report 5.

### **(iii) Conclusions: Outcomes and additionality**

Based on this evidence it is possible to conclude that good progress is being made on Convergence with two thirds of the indicators currently on track. In addition, for a further five indicators the gap with London is closing albeit either not fast enough or for the right reasons. However, what is not currently clear is the extent to which this change is being driven by and attributable to the SRF and therefore the extent to which the Games has impacted on East London.<sup>229</sup>

### **(iv) Progress in answering the research questions**

*To what extent and how have the host boroughs responded to the 2012 Games and the Host Borough Convergence Agenda by delivering a more integrated approach to regeneration and the physical environment across East London, in terms of public realm, transport connectivity and new developments?*

The creation of the Host Borough Unit and the willingness of the individual host boroughs to support it, coupled with the SRF and the role it plays in expressing the host boroughs determination to use the 2012 Games as a catalyst to create wealth, reduce poverty, support healthier lifestyles and develop successful neighbourhoods is a strong example of the steps being taken to ensure that the opportunity of hosting the 2012 Games is not lost. This conclusion is supported by the evidence available which suggests that there has been a more integrated approach to regeneration and the physical environment. However, the specific role played by, and the attribution of influence to, the host boroughs is something that needs further exploration.

*How, and with what success, have the host boroughs built upon the catalyst of the 2012 Games to help deliver the Convergence of major socio-economic outcomes between East London and the rest of London (including education and skills outcomes, employment levels and benefit dependency, housing quality, health, crime and participation in culture, sport and volunteering)?*

To date, good progress has been made on two-thirds of the socio-economic Convergence indicators where it is apparent that East London is 'closing the gap' with the rest of London. The latest available data shows that the gap is closing on indicators related to education and skills, crime and health. Slower progress is however being made with regard to employment and unemployment rates as while the gap is closing it is not closing fast enough to deliver Convergence. What is not currently clear is the extent to which the 2012 Games have catalysed this progress.

*What has been the longer-term impact of the 2012 Games on catalysing private and public investment in East London (and wider Thames Gateway area), and how did the Games influence the form, scale and timing of key investment decisions?*

It is currently too early to assess the longer-term impact of the 2012 Games on catalysing private and public investment in East London. The intention is to explore this issue more fully in Report 5. However, what is already apparent from the evidence available is that the Westfield development at Stratford city was "made possible by the infrastructure investment underpinning the Olympic Games"<sup>230</sup> and as a result was brought forward by around 5-7 years.

*To what extent have the 2012 Games and legacy investments enhanced the image of and satisfaction with East London as a place to live (and for whom), and how has this contributed to social and economic change in the area?*

Based on the survey of host borough residents specifically commissioned for this evaluation it is apparent that over three-quarters (79%) of respondents were satisfied with their local area as a place to live, with around a quarter (26%) noting that hosting the 2012 Games had made them more satisfied. In addition, 48% of respondents felt that the preparations for the 2012

<sup>229</sup> See Report 3: Baseline and Counterfactual which noted that the policy counterfactual for this sub-theme is that the SRF would not have been developed for the host boroughs in the absence of the Games.

<sup>230</sup> Grant Thornton (2012). Report 3: Baseline and Counterfactual; Meta-Evaluation of the Impacts and Legacy of the London 2012 Olympic Games and Paralympic Games (Final Report).

Games had already made an improvement to the image of the local area, with 54% of respondents agreeing that one of the longer-term impacts of the 2012 Games will be to improve the image of the local area. It remains to be seen, however, how this contributes to social and economic change in the area.

## 6.6 Summary research question

*What have been the impacts of the Games on East London, and in particular socio-economic and organisational change?*

While the full legacy impacts on the regeneration of East London will not fully emerge for a number of years, what is already apparent is that the planning and preparation for the Olympic Games have made a significant contribution to the physical transformation of East London. Based on the evidence available it can be concluded that without the Games the largely derelict, polluted and inaccessible site would have remained for the foreseeable future, the new Olympic venues would not have been constructed and the Olympic Park would not have been created. Coupled with this, the hosting of the 2012 Games has had a catalytic effect on a number of significant transport improvements at Stratford station and on the North London Line, to name but two, as well as a number of public realm improvements throughout the host boroughs. Furthermore, the 2012 Games has also leveraged wider private sector benefits, the most notable of which is the role that the Games played in bringing forward Westfield, Stratford City – and all the employment and economic benefits associated with it – by between five and seven years. As a result of this activity, parts of East London already look, feel and function differently to how they did before London was awarded the right to host the 2012 Games, and perhaps more significantly to how they would have done had London not been awarded the right to host the Games.

It is a transformation that will be built on post-Games as it is clear that the LLDC has developed a comprehensive programme of activity, which if delivered as intended will see the development of a significant number of new homes (both affordable and family), as well as a number of high quality community and social facilities including both primary and secondary schools and health centres. This transformation appears to already be impacting on the community, with a notable proportion of those who had moved into the host boroughs within the last year stating that the regeneration of the area was an important factor in their decision to move.

Another positive impact that is already apparent is that the activities related to the Games, either directly (eg the construction of the Olympic Park) or indirectly (eg employment at Westfield Stratford City), have created a significant amount of employment opportunities; a notable proportion of which have helped workless Londoners from the six host boroughs into employment. While it is not possible to calculate a total figure (due to the different sources of data) the evidence available suggests that these are likely to be in the tens of thousands.

Finally, in terms of the overarching objective that: "*within 20 years, the communities which host the 2012 Olympic and Paralympic Games will enjoy the same social and economic chances as their neighbours across London*" it is clear that to date, good progress has been made with East London 'closing the gap' with the rest of London on two-thirds of the socio-economic Convergence indicators, including those related to education and skills, crime and health.

## 6.7 Progress and next steps

The evidence currently available has provided a valuable insight into both the scale and nature of regeneration effects that have resulted from the 2012 Games, both directly and indirectly, and which have helped to drive forward to transformation of East London. Gaps in the evidence base do however remain both in terms of the attribution and additionality of the Games in driving forward this transformation, but also in terms of answering some of the key research questions. Due to the long-term nature of the legacy it will not be possible to fill some of these gaps within the timeframe of this phase of the meta-evaluation (up to March 2013). For other gaps, however, it is anticipated that some relevant evidence will emerge and the table below provides a summary of the evidence we expect to be able to draw on for Report 5.

<b>Evidence expected to emerge for Report 5</b>
Transport for London's Travel in London Report 5 Wider public/private investment in East London and assessment of the catalytic effect of the Games Details of the transport improvements and public realm improvements implemented and related monitoring data Finalised outputs for the LLDC Outputs from the activities of the LOCOG sponsors relevant to East London Assessment of the impact of the Games on commercial and residential land and property prices Assessment of the 'strategic added value' of the host boroughs Next Convergence Annual Report
<b>Possible/ Proposed approaches to addressing the evidence gap in Report 5</b>
Media analysis related to the perceptions of East London Analysis of relevant business data relating to East London Consultation with range of key stakeholders

## 7 Synthesis and summary

The interim pre-Games evaluation sets out the emerging finding across the four legacy themes, with evidence accumulated and synthesised from project-level evaluations, primary research, economic modelling, research and analysis of data and academic studies. The emerging conclusions in relation to the headline summary (replicated from each theme chapter) and headline cross-cutting research questions are given below.

### 7.1 Sport

*What have been the impacts of the Games on sport and physical activity, and in particular the development of mass participation, competitive school and elite sport?*

While the full impacts of sport-related legacy programmes and investments will take time to be fully realised, preliminary monitoring, output and evaluation data indicates that the Games are "*harnessing the UK's passion for sport to increase school-based and grassroots participation in competitive sport – and to encourage the whole population to become more physically active*".

#### (i) Mass Participation

The participation elements of Places People Play as well as School Games (the Government's key sport participation programmes) have provided opportunities for adults and young people from across the regions of England and nations of the UK to participate in sport, with a particular, and increasing emphasis on the participation of disabled people. In addition PESSYP, although discontinued, also contributed to increased participation.

DfE surveys of PESSYP indicate that over the period 2003/04 to 2009/10 participation in PE and out-of-school sport increased, with 55% of pupils in years 1 to 13 participating in at least three hours of high quality PE and out-of-hours school sport in 2009/10. Between 2003/4 and 2007/8, participation was measured for two hours (increasing to three hours in 2008/9) with participation rates increasing from 62% to 90% during this period. The Sport Unlimited strand of PESSYP attracted 1.2 million young people, retaining nearly 82% of these young people. Evidence also indicates that around 300,000 young people's participation was sustained.

Places People Play, through Sportivate, has provided participation opportunities to almost 100,000 young people, and is on target to achieve the milestones set. This coupled with School Games, which has over 13,600 schools registered, provides on-going participation opportunities especially given that both Sportivate and School Games are due to run until 2015.

Other legacy initiatives, such as Premier League 4 Sport have provided participation opportunities to young people. Approximately 43,000 young people have been engaged by Premier League 4 Sport, almost double its target, with the programme extended in duration and incorporating additional sports. In addition, 63% of young people that were engaged were then retained (at least 5 sessions per term), with 27% of young people sustained (at least 10 sessions over two terms).

Many legacy initiatives have facilitated participation in sport and physical activity for the first time, with evidence indicating that this participation is sustained. A survey of Inspire project organisers indicated that their perception is that almost 75% of participants would sustain their involvement in sport after the project.

Other legacy programmes, such as Change4Life Sports Clubs, Walk4Life and Games4Life, have facilitated participation in sport and physical activity, with interim evaluation evidence indicating that this participation is being sustained. Walk4Life has reported that that physical activity levels increased by 0.73 days a week of moderate physical activity for more than 30 minutes for users registered more than 90 days and Change4Life Sports Clubs has reported over 61,000 young people participating with 90% of these choosing to play sport every week at



the end of the first year (an increase of 40% when compared to data obtained when joining up). A survey of Inspire project organisers indicates that their perception is that almost 75% of participants would sustain their involvement in sport after the project.

The discontinued Free Swimming did facilitate an increase participation, however limited additionality was estimated.

According to the latest Taking Part survey data, adult participation levels are the highest since 2005/6, with the following participation rates recorded:

- Active sport participation in the last four weeks increasing from 53.7% in 2005/6 to 55.2% in 2011/12;
- 1x30 minute sessions of moderate intensity sport in the last week increased from 41.2% in 2005/6 to 43.8% in 2011/12;
- 3x30 minute sessions of moderate intensity sport in the last week increased from 23.2% in 2005/6 to 25.9% in 2011/12.

The increase in the active sport in the last four weeks measure, which had remained relatively flat between 2005/06 and 2010/11, suggests that the programmes may have taken time to become embedded and to result in noticeable changes across participation.

Taking Part also gives initial evidence of additionality, with 7.3% of those participating in sport and recreational physical activity indicating the Games have motivated them to do more.

When available, evaluations of Places People Play and School Games will provide further insight into the impact of these initiatives on mass participation. In addition monitoring the longer term trends (through Taking Part for example) will also indicate the extent to which participation increases have been sustained.

In addition to participation-related initiatives, increased participation is also impacted by facilities, and softer infrastructure, such as coaching, volunteering and club membership. Significant investment in these regionally and nationally will contribute to creating the foundation for a mass participation legacy.

### **(ii) Competitive School Sport**

Indications are that PESSYP did create a system through which additional and better quality opportunities for young people to participate in competitive sport were provided, with an evaluation of the Competitive School Sport strand of PESSYP revealing that the volume of sport competitions increased, resulting in more young people taking part in competitive school sport. In addition, opportunities were provided for young disabled people, people from different ethnic backgrounds and with good representation by gender.

Monitoring data from the School Games initiative indicates that over 13,600 schools have registered, exceeding the target of 12,000, with 31 competition formats at intra-school and inter-school level developed. In addition, these impacts are realised regionally, with schools from throughout England registered. Level 4 of School Games will see the nations involved as well. Given that this programme runs until 2015, it has and will continue to provide competitive opportunities for young people, with the foundation laid by PESSYP and other initiatives facilitating this.

School Games, building on the system created by PESSYP and facilitated by other legacy participation programmes should continue to increase the involvement of young people in competitive school sport. The extent to which this has been realised will be further assessed once the evaluation of School Games is available.

### **(iii) Elite Sport**

The development of the elite sport system has been significantly intensified with the introduction of increased funding and subsequent acceleration and refining of support activities, such as the development of elite sport coaching, sport support personnel, sport

technology innovation, hosting of major international championships, talent identification and support systems.

The performance of UK athletes in World Championships and major international events in 2011 compared favourably with the equivalent performances in 2007 which preceded the highly successful Beijing medal performance. Results from London 2012 show that GB exceeded its medals targets in both the Olympic and Paralympic Games. Team GB finished in third place in the medals table at the 2012 Olympic Games, exceeding its medal target by 17 medals (35%). This is an improvement of one position on 2008 and seven positions on 2004 and 2000 when it finished in tenth place. Results from the Paralympic Games show a total GB medal count of 120 which was in excess of the target set of 103 although GB's ranking in the medal table fell from second place in Beijing 2008 to third.

Performance in Rio in 2016 will be important in determining the extent to which the impact on elite sport has been sustained.

## 7.2 Economic

### *What have been the economic impacts of the Games, particularly in terms of employment and GVA?*

The economic impacts of the Games are occurring through two broad mechanisms. The first relates to the direct demand side effects on expenditure flows. Patterns of spend directly related to the preparation and staging of the Games can be derived from the management information systems of the ODA and LOCOG. The second mechanism relates to the ongoing impacts associated with legacy interventions and other indirect effects where supplementary analysis is required to generate outcome estimates.

Using a modelling approach it is estimated that ODA spend could have resulted in gross impacts of £8.2 billion of GVA (£2008 prices) and approximately 175,000 job years of employment in the UK over the period from 2007 to the end of Q1 2012. This gross impact is based on £6.5 billion of spending by ODA during this period.

Applying our displacement assumptions, our net UK GDP impacts are 88% of the level of the gross impacts above. The net GVA impact is estimated at £7.3 billion (£2008 prices) and the number of job years falls by just over 10% to 158,620.

**Figure 7-1: 'Net' regional GVA and employment impacts of ODA spend (2008 prices)**

	Total Output (£m)	Total GVA (£m)	Total Job Years of Employment	Total Earnings (£m)
<b>London</b>	5,120	2,800	39,500	1,170
<b>South East</b>	2,270	1,050	24,990	580
<b>East of England</b>	2,100	950	23,250	520
<b>West Midlands</b>	1,270	580	16,610	320
<b>East Midlands</b>	820	380	11,040	210
<b>North West</b>	870	370	9,810	200
<b>Yorkshire and the Humber</b>	620	280	7,820	150
<b>Scotland</b>	590	290	7,310	150
<b>South West</b>	570	270	8,200	140
<b>North East</b>	250	120	2,990	60
<b>Wales</b>	240	110	4,390	70
<b>Northern Ireland</b>	190	80	2,710	50
<b>Total</b>	14,910	7,280	158,620	3,620

*Source: Oxford Economics.*

The economic modelling planned for Report 5 should benefit from more accurate displacements assumptions arising from the various on-going evaluations and studies.

The London, South East and East of England regions have enjoyed the bulk of economic benefits of ODA spend in terms of GVA and employment. However some significant benefits are estimated in regions further afield while other regions and nations have benefitted substantially from impacts through the supply chain. Interim evaluation evidence indicates that there has been a good geographical spread of businesses registered on CompeteFor, the portal which was established to ensure equal access to information on Games opportunities.

There is limited evidence to date of the ongoing economic impacts of the Games. The LDA's evaluation of LEST, the key Games-related employability and skills initiative in London, estimates that the programme generated net GVA of £219 million up to the end of 2010/11 by enabling job vacancies to be filled. According to recent research for London and Partners, the net tourism gain to the UK economy of the Games could be up to £1.24 billion (at 2011 prices) for the period 2007-2017.

### 7.3 Community engagement

*What have been the social impacts of the Games, particularly in terms of volunteering, the cultural sector and community engagement?*

There is already some early evidence to suggest that the Games are having a positive social impact. Activity concerned with community engagement and volunteering continued to gather pace during Games-time although a significant number of events had already taken place prior to the Opening Ceremony.

Games-related projects have been successful in capturing the interest of numerous people across the country, which has resulted in the recruitment of volunteers and engagement with local communities. This includes the significant number of people across the country who have helped to deliver or participated in an Inspire Mark project and/or attended an event which formed part of the Cultural Olympiad. There is also some evidence that those who have participated in Games-related activity intend to continue being involved in their local community and perceive that this activity has helped to increase community cohesion in their area. However, at this stage there is limited evidence of the more general effect on participation in volunteering and culture, and the outcomes experienced by participants and the sector.

Significant work has been undertaken to engage with children and young people. Get Set, for example, achieved high penetration in terms of the proportion of eligible establishments which registered with the programme. Evaluation evidence suggests that participation had a positive effect on pupils and teachers and the view of teachers is that the programme helped to raise pupil aspirations, confidence/self-esteem and engagement in learning. A number of smaller-scale projects targeting disadvantaged young people have also taken place, along with activity to support the involvement of the further and higher education sectors. Elements of the Cultural Olympiad such as Stories of the World and Tate Movie have also resulted in the involvement of significant numbers of young people.

Activity to inspire sustainable living has also made good progress in terms of engagement with its target audiences, although evidence of the extent to which this has resulted in the uptake of sustainable behaviours is not yet available.

Work to change attitudes towards disability was largely focused on the Paralympic Games itself, complemented by additional work to improve understanding of disability and encourage disabled people to participate in community activity and social action.

Although considerable progress has been made in terms of filling gaps in the evidence base for the community engagement and participation legacy theme, a significant amount of research activity will take place in the latter part of 2012 and this evidence will be incorporated into Report 5.

## 7.4 East London

### *What have been the impacts of the Games on East London, and in particular socio-economic and*

While the full legacy impacts on the regeneration of East London will not fully emerge for a number of years, what is already apparent is that the planning and preparation for the Olympic Games have made a significant contribution to the physical transformation of East London. Based on the evidence available it can be concluded that without the Games the largely derelict, polluted and inaccessible site would have remained for the foreseeable future, the new Olympic venues would not have been constructed and the Olympic Park would not have been created. Coupled with this, the hosting of the 2012 Games has had a catalytic effect on a number of significant transport improvements at Stratford station and on the North London Line, to name but two, as well as a number of public realm improvements throughout the host boroughs. Furthermore, the 2012 Games has also leveraged wider private sector benefits, the most notable of which is the role that the Games played in bringing forward Westfield, Stratford City – and all the employment and economic benefits associated with it – by between five and seven years. As a result of this activity, parts of East London already look, feel and function differently to how they did before London was awarded the right to host the 2012 Games, and perhaps more significantly to how they would have done had London not been awarded the right to host the Games.

It is a transformation that will be built on post-Games as it is clear that the LLDC has developed a comprehensive programme of activity, which if delivered as intended will see the development of a significant number of new homes (both affordable and family) as well as a number of high quality community and social facilities including both primary and secondary schools and health centres. This transformation appears to already be impacting on the community with a notable proportion of those who had moved into the host boroughs within the last year stating that the regeneration of the area was an important factor in their decision to move.

Another positive impact that is already apparent is that the activities related to the Games, either directly (eg the construction of the Olympic Park) or indirectly (eg employment at Westfield Stratford City), have created a significant amount of employment opportunities; a notable proportion of which have helped workless Londoners from the six host boroughs into employment. While it is not possible to calculate a total figure (due to the different sources of data) the evidence available suggests that these are likely to be in the tens of thousands.

Finally, in terms of the overarching objective that: "*within 20 years, the communities which host the 2012 Olympic and Paralympic Games will enjoy the same social and economic chances as their neighbours across London*" it is clear that to date, good progress has been made with East London 'closing the gap' with the rest of London on two-thirds of the socio-economic Convergence indicators, including those related to education and skills, crime and health.

## 7.5 Cross-cutting headline research questions

*How far have the beneficial impacts so far accrued to their intended target groups/communities (including across measures of equality, inclusion and diversity)?*

In order to assess the extent to which the impacts delivered to date have accrued to their intended target groups/communities it is necessary to explore the question from two perspectives:

- The first is spatial, and in particular the extent to which the Games have benefited East London, London as a whole, as well as each nation and region of the UK;
- The second is from the perspective of equality, inclusion and diversity and the extent to which the Games have benefited particular groups.

In terms of the spatial distribution, the results from our economic modelling indicate that net economic benefits from the 2012 Games have accrued to all of the UK's nations and regions. London has enjoyed the greatest benefits, with 39,500 job years of net employment and an additional £2.8 billion of net GVA generated, and Northern Ireland the least (although it has still benefited from 2,700 job years of net employment and £80 million of net additional GVA).

The nations and regions have also benefited from the local delivery of a number of activities and legacy programmes related to the 2012 Games. This includes programmes delivered by Sport England, such as Places People Play and the School Games, the LOCOG Inspire Programme and the Pre-Games Training Camps. Across all of the nations and regions, these activities have provided a range of opportunities for young people and adults to engage with the Games, participate in sport, physical activity and culture as well as providing significant investment in sporting facilities throughout the UK.

Within London, host borough residents have already experienced a significant number of benefits. These include:

- Transport improvements, such as the doubling of the capacity of Stratford station;
- Improvements to the public realm, such as town square improvements;
- Development of Westfield shopping centre;
- Construction of the Olympic Park;
- Employment opportunities, a notable proportion of which will have benefited workless Londoners (for example, 37% of host borough beneficiaries of the LEST programme had never been in paid work before).

In terms of how the 2012 Games have impacted on different target groups to date, the evidence points to a range of benefits. The Taking Part survey shows that those from a black and minority ethnic group taking part in sport and physical recreational activity, cultural activity or voluntary work are around three times more likely to be motivated to do more by the Games than the general population. Young people are also more likely to say they have increased their participation in those activities as a result of the Games, with 14.7% of 16-24 year olds motivated to do more sport or recreational activity and 13.9% motivated to do more voluntary work, supporting the Games vision to "*inspire a generation*".

The same questions from the Taking Part survey indicate that disabled people are less likely than the general population to say the Games have motivated them to do more sport and physical activity, though 4.5% of disabled people participating still say the Games have motivated them to do more. Benefits to disabled people have been identified from a number of specific schemes. For example:

- 5.9% of those who engaged in Sportivate, a nationwide campaign to provide teenagers and young adults (14-25) with coaching in a sport of their choice, identified themselves as disabled;

- Participation by disabled people is seen as a priority for both School Games and Places People Play. The latter has dedicated £8 million of funding to tackling barriers faced by disabled people;
- International Inspiration activities have focused on engaging women and disabled people.

The evidence also points to engagement with and participation by young people. For example, the Get Set Programme, designed for schools and colleges to use the Games to enhance their learning experience, has engaged with a high proportion of eligible establishments (82% of the target).

Equality and inclusion have also been important components in the design and construction of the Olympic Park. For instance:

- The ODA, LLDC and LOCOG have considered accessibility issues for participants and spectators in venue design;
- The ODA Job Brokerage programme has performed well for different equality groups in terms of those recruited to work on the construction of the Olympic Park:
  - 17% of recruits were women, against a target of 11%;
  - 6% were disabled people, against a target of 3%;
  - 60% were BAME, against a target of 15%.

***How far have the Games changed attitudes to disability, and increased the participation of disabled people in sport, the economy, volunteering and culture?***

The evidence available at this stage suggests that some progress has been made in terms of increasing the participation of disabled people:

- The British Paralympic Association believes that the 2012 Games have helped to change attitudes by increasing awareness of the Paralympics. Monitoring data suggests that there has been an increase in opportunities for disabled people to take part in sport, for example through Sportivate sessions and £8 million of Places People Play funding (as noted in Section 8.1) has been allocated to removing the barriers faced by disabled people when participating in sport;
- Equality and inclusion was an important consideration in venue design and build, with consideration of accessibility issues for participants and spectators alike;
- London's staging of the Games helped to prompt or bring forward improvements in accessibility for disabled people on the transport network (eg step free access at a number of underground stations including Kings Cross and Green Park);
- A total of 6% of LOCOG's paid workforce were disabled which is at the upper end of the target of 3-6% and the proportion of disabled people placed into work by the ODA's Jobs Brokerage was also 6% (against a target of 3%). Disabled people have also benefited from Games-related employability and skills projects, although further research would be required to assess how far this participation has led to sustainable employment;
- The Games provided numerous opportunities for disabled people to get involved in events and activities in their local communities. The forthcoming Cultural Olympiad evaluation is expected to give an insight into how successful this activity has been at engaging disabled people;
- The host boroughs residents survey explored the influence of the Games on participation. 13% of respondents reported having a 'longstanding illness disability or infirmity'. Within this group the influence of the Games was most apparent in terms of participation in sport. Although the sample size is clearly small, some 47% (77) had done some form of sport or recreational physical activity in the past 12 months; 18% (15) of whom stated that hosting the Games had encouraged them to do more. A lower level of influence was reported in relation to participation in cultural activity and volunteering.

In addition, there are a number of examples of Games-related projects and activities which have sought to influence attitudes towards disability, including programmes on disability and disability sports which were broadcast on Channel 4 in the lead up to the Games.

Evidence on the extent to which the 2012 Games have changed attitudes towards and perceptions of disability will be provided by a specially commissioned module of the British Social Attitudes survey which is being undertaken during 2012.

***How far have the Games contributed to sustainable development, in particular through demonstration effects and the encouragement of behavioural change?***

CSL indicate that there was considerable potential for the Games to contribute to sustainable development through demonstration effects particularly in the areas of construction, infrastructure development and the staging of mega-events. Targets achieved by the ODA include:

- All permanent venues being at least 15% more energy efficient than 2006 building regulations;
- BREEAM excellent rating for all permanent venues;
- At least 20%, by value, of construction materials of a reused or recycled source;
- 98% of demolition material reused or recycled<sup>231</sup>.

The CSL has highlighted some positive developments around the sustainability learning legacy, notably the ODA Learning Legacy initiative and ongoing dissemination activity, but has also expressed concern that there has yet to be comprehensive roll out of key principles across Government. The CSL 'Making a Difference' report, expected to be published in early 2013, will assess the extent to which new standards of sustainability arising from London 2012 are beginning to be adopted by wider industries.

From a legacy perspective, it can be concluded the development of the Olympic Park and its infrastructure conforms to strong sustainability principles. The development of the Olympic Park has involved:

- Creation of over 100 hectares of greenspace (which will remain in legacy uses with 45 hectares of bio-diverse habitat);
- Planting of 4,000 semi-mature trees;
- Restoration of existing waterways;
- Creation of an integrated water management system comprising sustainable urban drainage, water capture, cleaning and reuse, flood risk management, water demand reduction, habitat creation and non-potable network;
- A process of habitat and species relocation through the collection of seeds and plant cutting prior to demolition.

This activity has resulted in the physical transformation of a largely derelict and polluted site.

Monitoring data for the DEFRA-funded Inspiring Sustainable Living projects (see Section 6.4) suggests that efforts to use the 2012 Games to inspire sustainable behaviours are progressing well, especially with regard to generating interest and engagement amongst the target audience. However, it is too early to assess the extent to which these projects, or the Games more generally, have helped to inspire behavioural change. Further evidence will come from post-Games project-level evaluations and also from more general indicators of sustainable behaviour (such as resource and energy use).

<sup>231</sup> Commission for a Sustainable London 2012. Annual Review 2011/12.

Within the host boroughs, the residents survey suggests that the Games have been influencing behaviour and attitudes towards sustainability. Of those who responded, 29% were aware that the 2012 Games are aiming to be the greenest ever. Although of those, three-quarters (78%) said that the Games had not caused them to change their behaviours with regard to sustainability. However 21% of respondents said the Games had prompted a change, including:

- 10% said that it had prompted them to increase recycling;
- 10% said that it had prompted them to protect their local environment;
- 7% said that it had prompted them to conserve water/reduce water wastage;
- 7% said that it had prompted them to adopt more environmentally friendly transport behaviour;
- 4% said it had prompted them to reduce energy consumption;

3% said that it had prompted them to change their attitude to sustainability.

***In what ways have the 2012 Games and associated activity contributed to well-being?***

Drawing on the evidence available for the interim evaluation, it is possible to conclude that the 2012 Games and associated activity have contributed to well-being in four broad ways.

Firstly, recent Taking Part survey data indicates that those intending to engage with the 2012 Games, either through actively following (an average happiness score of 8.1), attending events (7.9) or volunteering for a Games time role (8.3) were significantly happier than those who did not plan to follow the Games (7.5). Further data is required to understand causality but this does appear to be a positive finding.

Secondly, analysis of evidence from Taking Part surveys indicates that subjective well-being (or happiness) and perceptions of health are linked to sports participation. Based on the evidence available to date, it is apparent that the investment in legacy programmes and initiatives aimed at increasing sport participation, has facilitated participation by adults and young people:

- Taking Part survey data indicates increases in adult participation in sport, with those participating in at least one 30 minute session of moderate intensity sport in the last week increasing from 41.2% in 2005/06 to 43.8% in 2011/12. The Games had also motivated 7.3% of those participating in sport and recreational physical activity to do more;
- The host boroughs resident survey indicates that the 2012 Games have played a positive role in encouraging East London residents to do more sport or recreational physical activity, with a fifth (18%) of those participating saying that the Games had motivated them to do more. This increased for those aged 16-24 (25%), those not working (24%), those of a non-white ethnicity (29%) and those who live in Newham (30%). The reasons given for this included: 'more interested in sport in general' (50%); encouragement to 'take part in sport more often' (29%); and an introduction 'to new sports' (13%);
- In a survey of the Inspire programme, organiser perceptions were that 73% of the projects impacted on the health and fitness of participants. Positive health benefits at the individual level from participation in sport and physical activity are evidenced in the academic literature<sup>45</sup>, with physical activity (of a certain duration and intensity) delivering health benefits. However it needs to be recognised that while there is a demonstrated causal relationship, it is also true that improved health enables increased sport participation.

Third, the 2012 Games may have positively impacted on well-being by reducing worklessness, particularly amongst the long-term unemployed. By the end of 2010/11, the LEST programme in London (a programme designed to maximise the employment and skills benefits of the 2012 Games) had helped 34,500 people into employment, against a milestone of 36,000 for that time period. While it is safe to assume that this will have had a positive impact on supported individuals beyond the direct benefit of additional income, specific data on how it has impacted upon well-being are not available.



Finally, and again drawing on the findings from the host boroughs resident survey, it is apparent that the 2012 Games has positively contributed to well-being by improving the overall satisfaction of East London residents with the area in which they live, with a quarter (26%) of the respondents feeling that the Games had made them more satisfied (although, 10% felt that it had made them less satisfied). Again, while evidence of causality is not available it can be assumed that satisfaction with the area in which you live is likely to be one of many drivers of well-being.

***What have been the impacts of the staging of the Games on the international profile and reputation of the UK, London and East London?***

The Games has provided a platform for UK businesses to showcase their capabilities, particularly those that have benefitted from Games contracts and the delivery of facilities and infrastructure in the Olympic Park. It has also provided a unique opportunity to promote London and the UK as places to invest.

During the 18 days of the British Business Embassy held during the Games period, the UK government welcomed over 4,700 business leaders and global figures in what UKTI considered to be the largest and most ambitious set of trade and investment events ever held in the UK. The events showcased British business, design and technology to delegates and, through widespread press coverage, to the world. Businesses and Governments exchanged views and ideas, discussed challenges and developed new partnerships. UKTI expect the Games-time events to reap significant benefits for the UK economy both in terms of new export orders and inward investment projects. It is understood that future evaluation work will examine the degree to which Games-related initiatives in the period leading up to and during the Games have influenced levels of inward investment and exports.

The build up to the 2012 Games, as well as the Games themselves, are expected to have provided additional exposure for London and helped to influence business perceptions of the benefits of locating in the UK. A recent Cushman and Wakefield survey of world cities indicates that the percentage of international business leaders believing that London was doing the most to promote itself increased significantly from 16% in 2010 to 25% in 2011.<sup>232</sup> It may be that promotional activity around the Games has played some role in this increase. Monitoring data from London and Partners, the promotional agency for London, indicates that Games-related promotional activity has influenced 114 recent investment projects in London.

The 2011 CBI London Business Survey which received over 250 responses from a cross-section of London businesses suggests that business leaders are generally positive about the potential impacts of the Games on promoting the UK internationally: 92% of respondents believed that the Games will help promote London internationally. The 2012 Games have also undoubtedly impacted on the look, feel and functioning of parts of East London. The Games have seen the creation of a number of world class sporting venues; it has catalysed significant improvements to Stratford International station; it has brought forward the development of Westfield Stratford City – the largest urban shopping centre in Europe; and it has seen the installation of a number of permanent arts and cultural commissions in and around the Olympic Park by a number of internationally renowned artists. These developments in particular have the potential to significantly raise the international profile of East London both as a place to visit and as a place to invest.

Research for London and Partners, provides an indication of the expected tourism benefits from the Games. The net tourism gain to the UK economy of the Games is estimated to be £1.24 billion (at 2011 prices) for the period 2007-2017 once the various displacement effects have been accounted for. For London a net gain of £0.83 billion is estimated. The meta-evaluation survey of visitors to Olympic and Paralympics ticketed events and the International Passenger Survey will provide evidence on numbers of visitors and on how the Games have impacted on perceptions of the UK as a place to visit. There is also potential to analyse the impact of the Games on international perceptions of the UK using the Anholt Nations Brand

<sup>232</sup> Cushman and Wakefield European Cities Monitor 2005-2011.

Index. Evidence is expected later in 2012 on the outcomes of Games-related campaigns which are using the Games and the events around it as a means to promote the UK as a place to visit.

There is currently no evidence of the impacts of community engagement legacy activities on international profile and reputation, although some evidence may be provided by the evaluation of the Cultural Olympiad to the extent that it considers media coverage and visitor impacts (including visitors from overseas).

In sporting terms a successful Games can showcase not only the venues hosting Olympic events as potential host venues, but a range of other venues and facilities which the athletes, coaches and supporters will have access to, including for example the Pre-Games Training Camps. The number of major international sporting events taking place in the UK has undoubtedly increased as a result of London winning the right to host the 2012 Games, proving a strong indication that the UK's reputation abroad for hosting major sporting events has already been enhanced. The Olympic Park venues have already secured major international events post-Games, and discussions are underway regarding other potential events.

## 7.6 Looking forward to Report 5

The purpose of this report was to provide a first, and early, look at the impacts and legacy emerging from pre-Games activity. In doing this, it has identified a number of valuable and interesting findings, but it is limited. In particular, it is limited by both the availability of data and evidence at this particular point in time and, perhaps more significantly, by the amount of elapsed time available for legacy benefits, outcomes and impacts to have emerged and be realised.

While it is true that some legacy benefits will not emerge for a significant number of years, Report 5 (which will be drafted in early 2013) does provide an ideal opportunity to say more, and to go further in analysing the impact of the legacy of the 2012 Games. In headline terms Report 5 will:

- Include more data and evaluation evidence of legacy effects;
- Cover the legacy impacts of the Games themselves and post-Games activities;
- Be able to go further in its discussion of outcomes and additionality, and the attribution of benefit to the 2012 Games;
- Provide an assessment of the relevance and the quality of the evidence used within the report.

More specifically, the intention is that Report 5 will provide the opportunity to give a more complete picture of the legacy impacts within each theme. In the table below we provide an overview, by theme, of the points and issues that we anticipate will be covered in Report 5.

### **Harnessing the UK's passion for sport**

- A detailed discussion of NGB perceptions of the uses of the additional funding provided as a result of the Games and its perceived effectiveness
- A more detailed analysis of the Paralympic medals performance by GB in 2012
- A detailed consideration of the factors associated with success in particular sports
- A fuller assessment of the impact had by the Games on national pride, health and well-being
- Inclusion of data and evidence from: a number of Places People Play evaluations; an evaluation of the Schools Games; the results of the Games4Life/Change4Life campaigns; and an interim report on International Inspiration.
- The results of the Pre-Games Training Camps survey

### **Exploiting opportunities for economic growth**

- The next phase of economic modelling including: the cost of staging the Games; the cost of post-Games transformation; and any remaining preparation costs (including tourism and inward investment)
- Analysis of visitor numbers and attendance at Games and Cultural Olympiad events
- Analysis of a survey of the economic impact and perceptions of the UK as place to visit
- Further case studies of Sector Skills Council Employability projects

- A detailed discussion of the sustainability of the Games
- Inclusion of data and evidence from: the final CompeteFor evaluation; the evaluation of UKTI Games related activities; the evaluation of key tourism campaigns (eg GREAT, You're Invited)

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#### **Promoting community engagement & participation**

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- An estimate of the total number of volunteers in Games-related activity
- A more detailed discussion on the outcomes of engagement in Games-related sustainability projects
- Analysis of the extent to which the Games have increased levels of awareness and understanding of disability amongst young people and the general public
- Analysis of the extent to which the Games have generated positive perceptions of and pride in the talents of disabled people
- Inclusion of data from a number of relevant surveys (including Inspire, Games Makers, London Ambassadors)
- Inclusion of evaluation evidence from: the Cultural Olympiad, the Legacy Trust Programme, Get Set, Opportunity Inspired by 2012

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#### **Driving the regeneration of East London**

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- A more detailed discussion around the extent to which Stratford City has displaced retail and leisure activity from elsewhere in London
  - A detailed analysis of the impact of the Games on residential and commercial land values in East London
  - Further discussion on the impact of the Games on resident mobility in East London
  - An assessment of the role of the Games in catalysing wider private and public investment in East London
  - Inclusion of data and evidence from: Transport for London, the LLDC and the next Convergence Annual Report
  - An assessment of the 'strategic added value' of the host boroughs
  - Discussion around the impact of the Games on wider perceptions of East London
-

## A Sport outputs

This section provides further data on some of the key sports legacy programme. Information includes:

- Regional data for the 1 Places People Play programme;
- Description of the 2011 medal targets and achievements;
- Description of the achievements from International Inspiration in Phase 1 Countries.

## A.1 Places People Play Regional Data (Source: Sport England)

### Gold Challenge

*As at 27/06/12*

	Total	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire & Humberside
No of people registered	100,000									
% of English registrations by region	100%	20%	9%	10%	7%	30%	5%	5%	2%	12%

### Sportivate

*As at 31/03/12 (end of programme year 1)*

	Total	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire & Humberside
No of young people participating in 6 week course (engaged)	98,987	11,673	9,338	14,929	6,315	14,555	13,087	9,632	10,122	9,336
Total throughput	579,311	63,202	54,735	86,630	34,525	87,497	81,252	57,452	55,945	58,073
No of young people completing at least 5/6 sessions (retained)	80,870	9,117	7,499	11,300	5,293	11,644	11,359	8,318	8,115	8,225
Year 1 target retain	60,373	6,353	5,377	8,550	3,145	8,272	9,502	6,216	6,321	6,637
% Year 1 retain target	134%	144%	140%	132%	168%	141%	120%	134%	128%	124%

### School Games

*As at 24 May 2012*

	Total	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire & Humberside
No of schools registered	13,613	1,659	1,223	1,553	686	2,009	2,116	1,399	1,701	1,267
No of primary schools registered	9,517	1,148	875	1,044	478	1,463	1,504	930	1,159	916
No of secondary schools registered	3,120	396	269	377	161	409	452	359	411	286
No of 16+ FE colleges registered	68	11	3	13	4	9	10	8	6	4
No of special schools registered	564	58	47	56	34	91	97	53	81	47
No of special colleges registered	5				1			1	2	1
No of other schools registered	339	46	29	63	8	37	53	48	42	13
No of School Games Organisers in post	450	55	42	55	31	63	67	36	56	45
No of Local Organising Committees created for Level 3 Festivals	46	6	5	1	4	5	7	7	7	4

**Inspired facilities***As at June 2012*

	Total	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire & Humberside
No of applications in Round 1	633	72	68	60	36	83	130	69	58	57
No of awards in Round 1	356	52	36	31	19	40	70	41	40	27
No of new applications in Round 2	915	104	89	59	58	102	177	124	115	87
No of awards in Round 2	376	40	30	27	30	45	84	46	39	35
Total number of awards to date	732	92	66	58	49	85	154	87	79	62

**Iconic facilities***As at June 2012*

	Total	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire & Humberside
No of applications in Round 1	112	13	7	12	5	20	21	13	12	9
No of projects supported in Round 1	6	0	1	1	0	2	0	0	2	0
No of awards received in Round 1	4	0	1	0	0	1	0	0	2	0
No of applications in Round 2	28	3	4	3	0	4	4	2	2	6
No of projects supported in Round 2	6	1	0	1	0	0	1	0	1	2

**Protecting Playing Fields***As at June 2012*

	Total	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humberside
No of applications in Round 1	58	6	6	7	7	7	6	4	11	4
No of awards in Round 1	47	6	6	7	7	5	3	3	6	4
No of applications in Round 2	102	8	17	2	16	10	11	11	20	7
No of awards in Round 2	58	4	10	2	14	5	3	5	12	3
Total number of awards	105	10	16	9	21	10	6	8	18	7

**Sport Makers***As at 29/06/12*

	<b>Total</b>	<b>East</b>	<b>East Midlands</b>	<b>London</b>	<b>North East</b>	<b>North West</b>	<b>South East</b>	<b>South West</b>	<b>West Midlands</b>	<b>Yorkshire &amp; Humberside</b>
No of people registered for Sport Makers	<b>32,917</b>	3,859	2,680	4,599	1,408	4,367	5,459	3,429	3,026	4,090
No of people that have booked to attend an event	<b>23,885</b>	2,813	2,005	3,357	1,056	3,004	3,848	2,456	2,213	3,133
No of people that have attended an event	<b>18,198</b>	2,038	1,607	2,486	842	2,277	3,062	1,956	1,628	2,302

## A.2 2011 Medal Targets and Achievements

Targets set were for achievement within a range of 30-61 medals for World Championships and 4-9 at other major championships. 50 World Championship medals (in the upper range of the medals target set) were achieved compared with 42 medals gained in 2007 with a similar events calendar. 12 medals were also gained in the other major championships category (well above the target of 4-9). Thus we can conclude that Britain's performance in 2011 was stronger than that for the year prior to Beijing (where Britain went on to claim fourth place in the medals table) and this bodes well for a strong London performance.

**Figure A-2: UK Sport Summer Olympic Sports – 2011 Medal Targets and Achievements**

World Championships or equivalent events		
Sport	Target range	Achieved
Cycling	5 – 10	11
Swimming	5 – 8	5
Athletics	5 - 8	7
Rowing	4 - 6	10
Sailing	2 - 4	6
Canoeing	2 - 4	2
Boxing	2 - 3	4
Taekwondo	1 - 3	3
Judo	1 - 3	0
Gymnastics	1 - 3	1
Shooting	1 - 3	0
Fencing	1 - 2	0
Archery	0 - 2	0
Diving	0 – 1	0
Badminton	0 – 1	1
Synchro Swimming	One 6th-8th place finish (duet); One 10th-12th place finish (team)	8th place finish (duet); 10th place finish (team)
Weightlifting	Two female athletes to finish top 15. Two male athletes to finish top 25	One female athlete finished top 15. Highest placed male finished 27th
Table Tennis	Two athletes finishing between 33rd and 128 <sup>th</sup>	Four athletes finished between 33rd and 128th
Volleyball	One top ten finish (women's beach). Beat a country from a continent outside Europe, ranked top 25 in the world (men's indoor).	Best placed team 17 <sup>th</sup> . Team beat 3 teams from outside Europe ranked top 25 in the world
World Champs or Equivalent	Range 30 - 61	50
Hockey**	2 - 2	2
Equestrian*	1 - 3	7
Modern Pentathlon*	1 - 3	0
Triathlon***	0 - 1	3
Wrestling *	Two - three athletes achieve top six place finish	One athlete finished in the top 8
Handball	Both teams to compete against two targeted nations and achieve competitive result (within 7 points)	Men only competed against one of target nations – lost to Brazil by 7 points. Women won by one point against Japan and play second target match on November 23rd.
Water polo	Both teams to finish first or second in	Women qualified for



World Championships or equivalent events		
Sport	Target range	Achieved
	European Championships Qualifying Group	European Championships by finishing 2 <sup>nd</sup> in group. Men did not qualify from group
Basketball*	5th – 8th place (Men). 6th – 10th place (Women)	13th place finish (Men). 9th place finish (Women)
Other Majors Range	4 - 9	12

\* *European Championships*, \*\* *European Cup*, \*\*\* *World Series*.

Note: These results are based on medals won in Olympic disciplines only.

Source: UK Sport (2012).

In 2011, 73 Paralympic World Championship medals were won though in this case comparison with 2007 is not possible because of variations in the Paralympic Championships calendar. The Paralympic medal targets for World Championships, World Cup, and European Championships was in the range 134-170, with 184 being achieved.

**Figure A-3: Summer Paralympic Sports – 2011 Medal Targets and Achievements**

Medals	Target range	Achieved
Disability Swimming*	75 – 85	81
Disability Athletics	15 – 25	38
Paralympic Cycling	10 – 16	28
Para-Equestrian Dressage*	6 – 8	11
Disability Table Tennis*	6 – 7	6
Disability Archery	4 – 6	5
Powerlifting*	3 – 3	0
Disability Shooting**	3 – 3	3
Boccia**	2 – 4	2
Judo VI*	2 – 3	18-20 Nov
Paralympic Sailing	2 – 2	3
Wheelchair Basketball*	2 – 2	2
Wheelchair Tennis*	2 – 2	2
Adaptive Rowing	1 – 2	2
Wheelchair Rugby*	1 – 1	1
Wheelchair Fencing	0 – 1	0
Sitting Volleyball*	Team to finish 5th to 8th (men). Team to finish 5th to 8 <sup>th</sup> (Women)	9th place finish (men) 7th place finish (women)
Goalball	Team to qualify from Euro C (men). Team to finish top 6 in Euro A (women).	Team did not win promotion (men). Team did not finish top 6 (women).
Medal Range	134 – 170	184

Note: \* *European Championships* \*\* *World Cup*.

Source: UK Sport (2012).

Figure A-4: A Selective Overview of International Inspiration Achievements in Phase 1 Countries

	Azerbaijan	Brazil	India	Palau	Zambia
<b>Policy Advocacy</b>					
In government	<u>Achieved</u> : Ministry of Youth and Sport engaged and committed to II approach. Ministry of Education indicates willingness to incorporate aspects of TOPs programme into curriculum planning of the next curriculum planning cycle.	<u>Achieved</u> . Closer working relationships between Ministries of Sport and Education in relation to extra-curricular sport. <u>Achieved</u> . Inclusion of amended TOPs in Segundo Tempo and <i>Mais Educação</i> and new perspective on inclusive sport <u>Achieved</u> . The inclusion of sport in the UNICEF Municipal Seal and state lobbying raised profile in most <i>municipalities</i> and three states in NE Brazil. <u>Not achieved</u> . Ministry of Sport not committed to value of inclusive sport and TID/LTAD.	<u>Achieved</u> . A growing commitment to school sport and PE was reinforced and consolidated by II, which also stimulated inter- departmental co-operation (eg MHRD and MYAS). <u>Achieved</u> . MYAS accepted the importance of inclusive sport-for-development and its centrality for PYKKA. <u>Achieved</u> . National sport-for-development advocacy plan produced. <u>Achieved</u> II brokered new relationship between Ministry of Youth and Sport and Ministry of Human Resource Development.	<u>Achieved</u> : Promotion of sport in education system, ongoing review of potential of TOPs to contribute to PE curriculum development. Government commitment indicated by establishing of PE and Sport Office subsequent to II	<u>Partial</u> - CPM located in Ministry before dismissal and Govt. funding allocated to II, but continuation uncertain
In schools	<u>Achieved</u> : TOPS methodology introduced new perspectives on delivering the curriculum as well as on social inclusion through and in sport. TOPs and D+T both raise profile of school and community based sport.	<u>Achieved</u> . School partnerships achieved, although state support uneven. D&T embraced enthusiastically; TOPS methodology introduced new perspectives on inclusive extra-curricular sport.	<u>Achieved</u> . II articulated with, supported and influenced the direction of the increasing emphasis on PE in schools. It also illustrated the value of inclusive PE and sport and its relationship to the new emphasis on student-centred learning.	<u>Achieved</u> . School partnership achieved, although monitoring data unavailable. TOPS methodology introduced new perspectives on inclusive curriculum development and extra-curricular sport.	<u>achieved</u> - expansion of Dreams and Teams structure and PE curriculum consultation
In population	<u>Achieved</u> : Sport festivals and initiatives using sport for social integration involving for example children and young people in state institutions demonstrate potential of sport as a vehicle for inclusive practices.	<u>Partial</u> . II partners failed to agree a communications strategy. However, there was extensive coverage, especially of UNICEF activities. As always, it is not possible to measure coverage or impact. <u>Achieved</u> . UNICEF Municipal Seal activities and extensive publicity campaign will have raised profile in participating	<u>Partial</u> . Extensive media campaign and coverage achieved, although exposure and impact is unknown.	<u>Partial</u> : Development of links with disability organisation (Ngak Mak Tang) not developed. Links with sports federations strengthened with the development of camps. D+T / Young Leader led community festivals not fully established.	<u>Achieved</u> : High media exposure by UNICEF and BC, although impact unknown

	Azerbaijan	Brazil	India	Palau	Zambia
		municipalities			
<b>Systemic Policy Change</b>					
Sport policy	<u>Achieved</u> : Development of a more community and participation centred approach in the construction and focus of the National Sport Development Strategy. This represents a cultural shift from previous elite-focused and centralised sport plans.	<u>Not achieved</u> . Failure to accept the importance of inclusive sport and approaches to talent identification. <u>Achieved</u> The inclusion of sport in the UNICEF Municipal Seal raised the importance of sports policy and provision in many <i>municipalities</i> in NE Brazil	<u>Achieved</u> . There has been an increased in commitment to, and understanding of, inclusive sport at national, state and local levels. <u>Achieved</u> . II strongly influenced the design and delivery of PYKKA, the national rural sports strategy.	<u>Partial</u> : a review of the curriculum for PE and the contribution which TOPs approaches might make was underway. With the former CPM occupying a key post in the Ministry of Education centrally engaged in this review. Although not yet complete, sustainability beyond the project is promising. The recognition by the Ministry of Education of the significance of sport is evidenced in its support for training (in particular through TOPs) and its incorporation of inter-scholastic competition into the official educations calendar.	<u>Partial</u> : Location of CPM in department for sport development
• Education policy	<u>Likely to be Achieved</u> . TOPS viewed as relevant to PE curriculum, and there is evidence that this will be reflected in the next cycle of curriculum planning of the PE curriculum. The National Institute of Education has committed to the delivery of TOPs training reflecting the enthusiasm of leading education professionals for the TOPs approach.	<u>Partial</u> . TOPS not viewed as relevant to PE curriculum, although amended version used for extra-curricular programmes.	<u>Achieved</u> . D&T and PEC pedagogy articulated with and contributed to the development of new pupil-centred educational philosophy. <u>Achieved</u> . Contributed to revision and implementation of PE curriculum via the development and wide distribution of Physical Education Cards (PEC). Also included in teacher training curriculum.	<u>Achieved</u> : The existence of II and associated activity clearly raised the profile and status of sports actors in the governmental system and more broadly in Palauan society. This is evidenced by the engagement of senior officials in the Ministry of Education in the construction of the II programme and in aspects of its delivery	<u>Partial</u> : Major contribution to consultation and design of PE curriculum; incomplete due to factors external to II
<b>Sport Development Examples</b>					
	<u>Achieved</u> : Capacity building - NPC and Athletics Federation	<u>Not achieved</u> : Some training for strategic planning	<u>Not achieved</u> : Professionalisation /	<u>Partial</u> : the Track and Field Athletics Federation	<u>Not Achieved</u> : develop structures and pathways for

	Azerbaijan	Brazil	India	Palau	Zambia
	develop strategic planning and organisational development strategies respectively. <u>Partial</u> : Coach trainer and qualified coach numbers for able bodied and disability sport are partially met.	provided, but no implementation because lack of resources, low priority. And weak relationships between federal and regional governing bodies <u>Partial</u> : Strengthening of sports admin. Capacities - some municipalities involved in Municipal Seal developed new administrative structures, including sports councils. <u>Not achieved</u> . Development of structures and pathways for athlete progression. LTAD approach rejected, links between schools and sport clubs not established and only limited implementation of II scholarships.	modernisation of NF structures, and processes - although some strategic planning and development undertaken, implementation was limited because lack of resources and low priority. <u>Partial</u> . Developing science support / sports science. Expert advice obtained from UK administrators, plans and strategies produced, but implementation has been limited. <u>Achieved</u> . Some sports administrators attended PG courses in the UK and returned to India and obtained senior positions, including roles at Delhi 2010.	developed capacity for strategic planning. Volleyball had not begun the process but advocacy was still taking place with the new Board of the federation. Workshop on strategic planning devised and run within II / NOC resources which suggests capacity for sustainability. <u>Partial</u> : The adoption of the OSEP framework for training, the development of key personnel as OSEP trainers, and the preparation for training of NF personnel was in process and there is good evidence that this will be sustained beyond II. <u>Not achieved</u> : The training of two elite sport coaches originally programmed.	progression of athletes and sport personnel (UK Sport strand) <u>Partial</u> : Increase capacity in communities and sport federations and Paralympic Sport through training of sports leaders, coaches, and sports administrators in UK Sport strand (some increase during initial phase)
<b>Development through Sport Examples</b>					
	<u>Partial</u> . 22 Safe Play Spaces serving disadvantaged target groups developed (against an initial target of 50). 20 Child Friendly Schools, 14 IDP schools, 20 youth clubs and 3 state children's institutions are reported as having been supplied with equipment. 727 teachers, coaches and community resource persons, 229 young leaders trained (target of 1125 PE teachers and young leaders and 450 coaches and IDP teachers). Some success with integration through sport of young disabled and young people in range of state	<u>Achieved</u> . UNICEF trained approximately 8,000 community sports mobilisers in 11 states in NE Brazil and more than 300 teachers/PE students and government officials. <u>Achieved</u> . Segundo Tempo and <i>Mais Educação</i> volunteers/coaches trained. <u>Partial</u> . UNICEF municipal survey was useful consciousness-raising exercise, although concerns about the validity of data.	<u>Achieved</u> . II has strongly delivered and influenced the content and delivery of leadership training for large numbers of community coaches and sports leaders delivering inclusive sport. <u>Achieved</u> . Special Olympics Bharat greatly improved coach capacity and the development of PECability has substantially extended its capabilities and reach.	<u>Partial</u> : the attempts to use sport as a vehicle for social integration of disabled people, and through TOPs training to use sport in a reflexive manner to engage with wider issues affecting young people was evident. EASCs as a vehicle for promoting Palauan values and health messages proved more challenging.	<u>Partial</u> : safe play spaces created but slower progress than planned <u>Partial</u> : 4 NGOs deliver peer leader training.

	Azerbaijan	Brazil	India	Palau	Zambia
	institutions.				
<b>Sport and Education Examples</b>					
	<u>Partial</u> : While the training of staff delivering TOPs in schools is evident, and the training of TOPs trainers also (with cascading of training also taken on by National Education Institute), difficulties with establishing the exact nature of multipliers being used mean that calculation of achievement of targets is not always transparent.	<u>Achieved</u> . TOPS adapted and IEE using methodology.	<u>Achieved</u> . Greatly increased capacity of schools and communities for inclusive sport via work with PYKKA, PEC and PEC-ability cards.	<u>Achieved</u> : The training of TOPs tutors means pupils in all schools will in principle have access to a TOPs trained teacher. Demand post-training for TOPs materials was high. <u>Partial</u> : Training of young leaders who contributed to the promotion of physical activity and sport (though the cycle of training of young leaders was disrupted by demands of hosting Micronesia Games).	<u>Achieved</u> : Increase capacity in schools through training of PE teachers (BC strand)
<b>Sustainability</b>					
Sport Development	<u>Likely to be achieved</u> . The formal adoption of the National Sport Development Strategy as the basis for sport development over the planning period augurs well for sustainability. The CPM however was central to the development of a new approach to planning and it therefore remains to be seen whether this new approach will be sustained. Coaching initiatives also may remain limited unless championed beyond the II programme.	<u>Not achieved</u> . Weak governing bodies and failure to adopt LTAD.	<u>Not achieved</u> . UK Sport strand terminated, with limited developmental work.	<u>Likely Achievements</u> : Engagement of the NOC and thus the NFs with the OSEP qualifications system including the training of key local leaders as OSEP trainers offers a good prospect for the development of further capacity in community coaching and administration of NFs.	<u>Not Achieved</u> - UK Sport strand terminated
Sport and Education	<u>Achieved</u> . Institute of Education using TOPS methodology in training programmes. Proposed incorporation of TOPs approach in the next curriculum planning cycle (from 2012).	<u>Achieved</u> . MOU with Institute of Sports Education using TOPS methodology in training programmes <u>Partial</u> . Future of D&T is not clear without state support	<u>Achieved</u> . PEC established as part of educational policy and teacher training and curriculum and articulates with new educational philosophies.	<u>Partially achieved</u> : Engagement of education and sport stakeholders in curriculum planning exercise around the introduction of TOPs materials / philosophy.	<u>Achieved</u> – curriculum impact (if adopted) and establishment of Dreams and Teams hub structure

	Azerbaijan	Brazil	India	Palau	Zambia
	There is enthusiasm on the part of D+T partner schools but it remains to be seen whether expansion of this programme can be resourced.				
Development through Sport	<u>Partially achieved</u> : Development of relatively small scale initiatives, but with important demonstration effects, in the use of sport to integrate disabled children or from state institutions (orphanages, correctional institutions, facilities for disabled people) into interaction with other children. Resources for progressive teaching / coaching approaches provided by Right to Play (and to a lesser degree by Reliable Futures) but sustainability threatened by withdrawal of RtP from Azerbaijan.	<u>Achieved</u> MOU with Institute of Sports Education to use TOPS methodology in training programmes. Amended TOPS in Segundo Tempo and <i>Mais Educação</i> . <u>Achieved</u> Inclusion of sport in UNICEF's <i>Municipal Seal</i> should lead to expansion <u>Achieved</u> . Inclusion of II in successful Rio 2016 Olympic bid.	<u>Achieved</u> . The PYKKA strategy and the PYKKA Resource Centre at the National Institute of Physical Education are firmly established, although implementation will remain uneven for some time.	<u>Achieved</u> : Integration of (small numbers of) disabled children into sporting / physical education activity in High School and in some elementary schools. <u>Partial / not achieved</u> : delivery of health education and Palauan values through EASC programmes.	<u>Achieved</u> : In relation to use and management of safe play spaces with for example parent forums; the embedding of peer leadership training in key NGOs.

Source: *Evaluating the Implementation and Impact of the International Inspiration Programme Phase 1 – Final Report, Loughborough Partnership – Centre for Olympic Studies & Research and Institute of Youth Sport, Loughborough University (with the School of Sport, Stirling University).*

## B East London outputs

### B.1 LLDC expected outputs

This Annex provides the details of the outputs expected to be delivered by the LLDC in relation to the transforming communities sub-theme

**Figure B-1: Transforming communities outputs**

Legacy programme/ initiative	Lead Organisation	Total Outputs	Units	Time period
New housing and infrastructure on OP	LLDC	2,100,000	No. of visits to the Park (excluding venues) per annum	2015 onwards
New housing and infrastructure on OP	LLDC	90	% local and regional visits	2015 onwards
New housing and infrastructure on OP	LLDC	600	No. of registered inactive people in host boroughs to become active per annum	2014 onwards
New housing and infrastructure on OP	LLDC	6	No. of multi-sports festivals for young people from each of the sub regions in London per annum	2014 onwards
New housing and infrastructure on OP	LLDC	943	One Movement community sports festival: no. young people participating	2012
New housing and infrastructure on OP	LLDC	124	One Movement community sports festival: no. adults coaching or spectators	2012
New housing and infrastructure on OP	LLDC	300	Six host borough community swimming gala: no. young people participating	2012
New housing and infrastructure on OP	LLDC	1,350	Six host borough community swimming gala: no. spectators	2012
New housing and infrastructure on OP	LLDC	200	No. older adults (65+) from host boroughs to complete adult Learn to Swim programmes per annum	2014 onwards
New housing and infrastructure on OP	LLDC	60	Bikeworks programme: no. disabled people participating in sport	2012
New housing and infrastructure on OP	LLDC	100	% timber from legal and sustainable sources	2013 onwards
New housing and infrastructure on OP	LLDC	70	% commercial waste recycled or composted	2015 onwards
New housing and infrastructure on OP	LLDC	102*	Open Space (Ha)	2015 onwards
New housing and infrastructure on OP	LLDC	45*	Biodiverse habitat (Ha)	2015 onwards
New housing and infrastructure on OP	LLDC	680,585	Total no. of visits to the Aquatics Centre per annum	2014 onwards
New housing and infrastructure on OP	LLDC	63,525	No. of community visits to the Aquatics Centre – adult per annum	2014 onwards
New housing and infrastructure on OP	LLDC	40,425	No. of community visits to the Aquatics Centre – junior per annum	2014 onwards
New housing and infrastructure on OP	LLDC	4,500	No. of community visits to the Aquatics Centre - session activities per annum	2014 onwards
New housing and infrastructure on OP	LLDC	16,380	No. of community visits to the Aquatics Centre - school holiday programme per annum	2014 onwards
New housing and infrastructure on OP	LLDC	129,000	No. of visits to the Aquatics Centre - coaching and lessons per annum	2014 onwards
New housing and infrastructure on OP	LLDC	451,490	Total no. of visits to the Multi-Use Arena per annum	2013 onwards
New housing and infrastructure on OP	LLDC	176,859	No. of sports visits to the Multi-Use Arena per annum	2013 onwards

New housing and infrastructure on OP	LLDC	183,246	No. of health & fitness visits to the Multi-Use Arena per annum	2013 onwards
New housing and infrastructure on OP	LLDC	91,385	No. of events visits to the Multi-Use Arena per annum	2013 onwards
New housing and infrastructure on OP	LLDC	75	% packaging (food) that is recyclable or biodegradable	2015 onwards
New housing and infrastructure on OP	LLDC	70	% commercial waste recycled or composted	2015 onwards
New housing and infrastructure on OP	LLDC	95	% visitors to events and attractions to arrive by public transport, cycle or foot	2013 onwards
New housing and infrastructure on OP	LLDC	60	% of 'paperless' tickets issued	2015 onwards
New housing and infrastructure on OP	LLDC	75	% temporary structures re-used /reusable	2015 onwards
New housing and infrastructure on OP	LLDC	0	% waste from events to landfill	2013 onwards
New housing and infrastructure on OP	LLDC	800,000	Total no. of visits to the ArcelorMittal Orbit per annum	2014 onwards
New housing and infrastructure on OP	LLDC	75	Parklands and venues: % employees from the 6 host boroughs	2014 onwards
New housing and infrastructure on OP	LLDC	50	Parklands and venues: % employees women, disabled or BAME	2014 onwards
New housing and infrastructure on OP	LLDC	40	Parklands and venues: % supply chain spend with local SMEs	2014 onwards
New housing and infrastructure on OP	LLDC	100	% employees to be paid London Living Wage as a minimum - Tier 1 and 2	2014 onwards
New housing and infrastructure on OP	LLDC	36	No. apprenticeships created in venue operator contract per annum	2014 onwards
New housing and infrastructure on OP	LLDC	2,000,000	Total no. of visits to the Stadium per annum	2014 onwards
New housing and infrastructure on OP	LLDC	35	% BAME employees on the Park	2014 onwards
New housing and infrastructure on OP	LLDC	42	% women employees on the Park	2014 onwards
New housing and infrastructure on OP	LLDC	10	% disabled employees on the Park	2014 onwards
New housing and infrastructure on OP	LLDC	100	% lifetime homes	2015 onwards
New housing and infrastructure on OP	LLDC	10	% wheelchair accessible homes	2015 onwards
New housing and infrastructure on OP	LLDC	200	No. days of volunteering places per annum	2014 onwards
New housing and infrastructure on OP	LLDC	75	% of volunteers from the host boroughs	2014 onwards
New housing and infrastructure on OP	LLDC	75	% customer satisfaction rating	2014 onwards
New housing and infrastructure on OP	LLDC	20	No. of schools in the host boroughs engaged in Legacy Programmes	2012 onwards
New housing and infrastructure on OP	LLDC	60	No of young people participating in Legacy Youth Radio per annum	2012 onwards
New housing and infrastructure on OP	LLDC	35	No of young people engaged on the Legacy Youth Panel per annum	2012 onwards
New housing and infrastructure on OP	LLDC	1,500	No. of people from the host boroughs participating in outreach and engagement programmes per annum (with 7,000 in 2012)	2012 onwards
New housing and infrastructure on OP	LLDC	100	No. of timebank members per annum	2015 onwards
New housing and infrastructure on OP	LLDC	600	No. of volunteer members of the Good Gym	2012 onwards
New housing and infrastructure on OP	LLDC	40	No. of local people trained as tour guides	2012 onwards
New housing and infrastructure on OP	LLDC	100	% of tour guides from the host boroughs guiding LLDC bus, boat & walking tours	2012 onwards



New housing and infrastructure on OP	LLDC	Up to 6,870	No. new homes (created over the next 15 years)	2014 onwards
New housing and infrastructure on OP	LLDC	42	% family homes	2015 onwards
New housing and infrastructure on OP	LLDC	20	% affordable housing (minimum, 35% target subject to viability)	2015 onwards
New housing and infrastructure on OP	LLDC	4,421	No. new jobs created (over the 15 yr construction period, excl construction jobs)	2015 onwards
New housing and infrastructure on OP	LLDC	2,621	No. new construction jobs created (peak number of construction workforce estimated to occur in 2023)	2015 onwards
New housing and infrastructure on OP	LLDC	25	% of local people in construction	2014 onwards
New housing and infrastructure on OP	LLDC	100	% new homes achieving Code for Sustainable Homes level 4 or above	2014 onwards
New housing and infrastructure on OP	LLDC	100	% new homes achieving reduction of regulated carbon emissions to zero	2014 onwards
New housing and infrastructure on OP	LLDC	100	% new homes achieving 65% reduction of regulated carbon emissions onsite	2014 onwards
New housing and infrastructure on OP	LLDC	100	% non-residential buildings reducing regulated carbon emissions by 40%	2014 onwards
New housing and infrastructure on OP	LLDC	100	% development achieving 100% timber products from legal and sustainable sources as defined by CPET	2014 onwards
New housing and infrastructure on OP	LLDC	95	% construction, demolition and excavation waste to landfill from 2014	2014 onwards
New housing and infrastructure on OP	LLDC	100	% homes with access to superfast broadband and Wi-Fi	2014 onwards
New housing and infrastructure on OP	LLDC	30	No. Intermediate Labour Market (ILM) places created per annum	2013 onwards
New housing and infrastructure on OP	LLDC	60	% ILM places supported into long term employment	2013 onwards
New housing and infrastructure on OP	LLDC	25	No. apprenticeships created per annum	2013 onwards
New housing and infrastructure on OP	LLDC	1,500	No. person days of volunteering per annum	2013 onwards
New housing and infrastructure on OP	LLDC	890	No. volunteers per annum	2013 onwards
New housing and infrastructure on OP	LLDC	85	Estate and facilities management: % employees from the 6 host boroughs	2013 onwards
New housing and infrastructure on OP	LLDC	35	Estate and facilities management: % employees women, disabled or BAME	2013 onwards
New housing and infrastructure on OP	LLDC	50	Estate and facilities management: % supply chain spend with local SMEs	2013 onwards
New housing and infrastructure on OP	LLDC	25	No. days training provided to SMEs with supply chain contracts per annum	2014 onwards
New housing and infrastructure on OP	LLDC	**	Estate and facilities management: % workforce with permanent residency (12 + months) in the host boroughs	-
New housing and infrastructure on OP	LLDC	75	% waste recycled	2013 onwards
New housing and infrastructure on OP	LLDC	70	% scores in customer satisfaction survey being high	2013 onwards

Note: \* These figures include 9.9ba of open space and 9.4ba of Biodiversity Action Plan habitat to be delivered specifically as a result of the Legacy Community Strategy and in addition to that created as a result the development of the Olympic Park for the purposes of the Games. \*\* LLDC currently in process of defining specific targets

## B.2 Art in the Park: Overview of projects

This Annex provides a brief summary of each of the projects delivered as part of the ODA's Art in the Park programme

**Figure B-2: Art in the Park projects**

Project	Location	Artist	Completion	Description
History trees	Various around the OP	Ackroyd & Harvey	Spring 2012	The planting of 10 semi-mature trees, each supporting a large bespoke metal ring to make the ten entrances to the Olympic Park
Steles (Waterworks)	Waterworks River	Keith Wilson	Winter 2011	A series of striking and colourful sculptures that connect the parkland with the river – they will be used for boat moorings post-Games
Mapping your manor	Various in and around the OP	Lucy Harrison	December 2011	An audio soundtrack to be listened to in the vicinity of each of the entrance market trees – tracks include poems, songs and memories from people who live or work near the Park
RUN	Copper Box	Monica Bonvicini	Spring 2012	Three 9m-tall letters forming the word 'RUN' made of glass and stainless steel. In daylight the letters will act as a mirror and at night the letters will become more transparent and glow with internal LED lighting
Light up your street	Various sites in Hackney Wick	Lucy Harrison	September 2011	The projection of song lyrics onto building in Hackney Wick over three evening events
Utilities buildings	Utility buildings in the south of the OP	Clare Woods/ DJ Simpson	Spring 2012	Two large scale works to be integrated into the facades of two utilities buildings – these will be highly visible in the legacy uses of the Park
Ifo spectrum	Northern Headhouse	Carsten Nicolai	Summer 2010	An alternative representation of the Olympic Emblem for the fence of an infrastructure building on the OP
Running water	Bridge in the north of the OP	Peter Lewis with Artichoke and Water Sculptures	Spring 2012	A constant and dramatic flow of water from one of the bridges in the north of the park
bit.fall	Viewed from 2012 Garden towards the Aquatics Centre	Julius Popp	Spring 2012	Five waterfalls each creating a continuous cascade of words
The Clouds Bridge	Angel lane bridge, Stratford	Nazareno Greg and Oscar Bauer	Summer 2010	A bridge painted with intricate patterns of cloud forms
Floating Cinema	Throughout waterways in the host boroughs	Somewhere and Studio Weave with UP Projects	December 2011	A floating structure with a varied and vibrant programme of on-board screenings, creative canal tours, talks and workshops as well as larger scale outdoor film events
Artists in residence	Park-wide and external venues	Neville Gabie and Samantha Wilkinson	December 2011	A series of projects that celebrate some of the stories of the people involved in building the park
Inter Alia	London 2012 Gardens	Grenville Davey	Spring 2012	An installation incorporated into the retaining walls of the Central Park bridge made up of 'finger prints' of different sizes
Underwhirl and One Whirl	Footbridge near the Velodrome and underpass under the A12	Martin Richman	Spring 2012	Incorporation of an art commission onto one bridge and the walls and ceiling of an underpass
Fast, faster, fastest	Bridge in the OP	-	Summer 2012	A light and sound trail passing across the bridge to give people a sense of how fast athletes run. The artwork is

				activated on either mast by the press of a button to select a race (ie Men's Olympic 100m).
Streamline	Footbridge to the Olympic Stadium and Greenway underpass	Jason Bruges Studio	Autumn 2011	Illumination of a bridge with an imaginary water surface overhead – the illumination represents the patterns produced by Olympic and Paralympic swimmers
Winning Words: Ulysses	Ulysses Place – Olympic and Paralympic Village	Alfred Lord Tennyson	Spring 2012	A programme of permanent poems throughout the Park including both commissioned poems for the Olympic Park and existing poems nominated by the public
Winning Words: Spark Catchers	North of the Park	Lemn Sissay	Spring 2012	
Winning Words: Eton Manor	Eton Manor	Carol Ann Duffy and Stephen Raw	Spring 2012	
Winning Words: Wild Swimmer	Near the Aquatics Centre	Jo Shapcott	Spring 2012	
Winning Words: The Fun Palace	Near the ArcelorMittal Orbit	Caroline Bird	Spring 2012	
Winning Words: Bicycling For Ladies	Near the Velodrome and BMX Track	John Burnside	Spring 2012	
Memory Marathon	26 mile route around the Olympic Park	Simon Pope and Film and Video Umbrella	Spring 2010	A large scale participatory event covering a specially planned route through the host boroughs with 104 residents who recalled their stand-out memories from Olympic history
Fantasticology: Greenway Markers	The Greenway	The Klassnik Corporation, Rita Ikonen and We Made That	Autumn 2011	The use of graphic patterns from textured manhole covers in the area on vertical markers and 'entrance mats' into the Greenway
Fantasticology: Fantastic Factology	Park-wide		Spring 2012	A series of plaques on benches distributed through the Park each displaying a fact, which have either been submitted via a website or through a series of local workshops
Fantasticology: Wildflower Meadows	South-east corner of stadium island			A wildflower meadow celebrating the industrial heritage of the site
View Tube	The Greenway, Pudding Mill Lane	Lisa Cheung	Summer 2011	Built using recycled shipping containers the 'View Tube' provides a new venue and facility for local people and visitors.
Shoreditch Star	Five host boroughs	Shoreditch Trust	Summer 2010	An and arts and culture community engagement project themed around young people's views on public art and design, inspired by arts projects in the Olympic Park
four colours	The Royal Artillery Barracks	Amanda Westbury, Janetka Platun, Helen Ball and Susie Miller	Summer 2011	Artist led community engagement events to celebrate the Royal Artillery Barracks' role at a London 2012 venue.

## C Host boroughs resident survey

This Appendix provides a summary of the survey of host borough residents. This survey was specifically commissioned to inform the meta-evaluation as it sought to gather information of the views, behaviours and attitudes of the residents in the six Olympic host boroughs: Barking and Dagenham, Greenwich, Hackney, Newham, Tower Hamlets and Waltham Forest.

The survey was conducted between the 27 February 2012 and the 27 April 2012.

### C.1 Method

The method used for this survey was consistent with that of the DCMS Taking Part survey, which started in 2005/06 and collects data on the nation's engagement with sport, libraries, arts, heritage and museums and galleries.<sup>233</sup> The questions on cultural engagement, sports participation, volunteering, Olympic engagement and demographics in this survey have been replicated directly from the current Taking Part survey.

In addition to these questions, questions were also asked in the host boroughs resident survey on perceptions of: the local area; community cohesion; access to jobs; green issues and sustainability; satisfaction with the Olympic Park legacy plans and the consultation process; and how long people had lived in the area. These questions were taken from a range of sources with some replicating those previously asked in the DCLG Place Survey or other local borough surveys.

This survey does differ from the standard Taking Part methodology in that it is currently a one-off survey (as opposed to a rolling annual collection) and that it was just focused on the six host boroughs (as opposed to England as a whole).

The survey was carried out using a quota sample, with sample points selected by a random location methodology. Random location is a tightly controlled form of face to face quota sampling where sample points are drawn from a small set of homogenous streets within a local authority. As 200 interviews were required within each of the six Local Authorities (LAs), the survey sample selection can be viewed as six random location selections (one within each Olympic Borough). Sample units were selected randomly, with the probability of each sampling unit being selected proportional to its population.

For each selected sample unit all of the addresses were printed out in a street list and sent to interviewers. Interviewers could only interview residents of these pre-selected addresses. This meant that interviewers were given very little choice in the selection of respondents, eliminating some of the selection bias that may be present in other forms of quota sampling.

Interviews were carried out on weekdays from 2pm-8pm and at the weekend to ensure that the achieved sample was not biased towards those who are more likely to be at home during the day. Quotas were set within each borough by age, gender and working status. This ensured adequate representation of harder-to-reach people in the sample – such as full-time workers and younger people. The quotas set on age and gender were based on ONS Mid 2010 Population Estimates and those set on working status were based on the latest available ONS Annual Population Survey (Jul 2010-Jun 2011). All interviewers had to leave 3 doors between each successful interview, to minimise the clustering of the achieved sample.

In total 1,320 adults responded across the six boroughs which gives an approximate level of confidence at the 95% level on the whole sample of +/-2.7%. But, in terms of sub-sample

<sup>233</sup> See [http://www.culture.gov.uk/what\\_we\\_do/research\\_and\\_statistics/4828.aspx](http://www.culture.gov.uk/what_we_do/research_and_statistics/4828.aspx) for full detail on Taking Part and the methodology used.

analysis (ie at the individual borough level) the approximate level of confidence at the 95% level rises to +/- 7.5%. Given this, results that focus on a particular sub-sample should therefore be viewed with a degree of caution.

## C.2 Results

### (i) Respondent demographics

In total 1,320 people responded to the East London survey. These respondents were broadly split across the six host boroughs (see Figure C-1), with the following six charts providing an overview of respondent demographics looking at: gender, age, ethnicity, housing tenure, employment status and occupational grouping.

Figure C-1: Residential borough of survey respondent

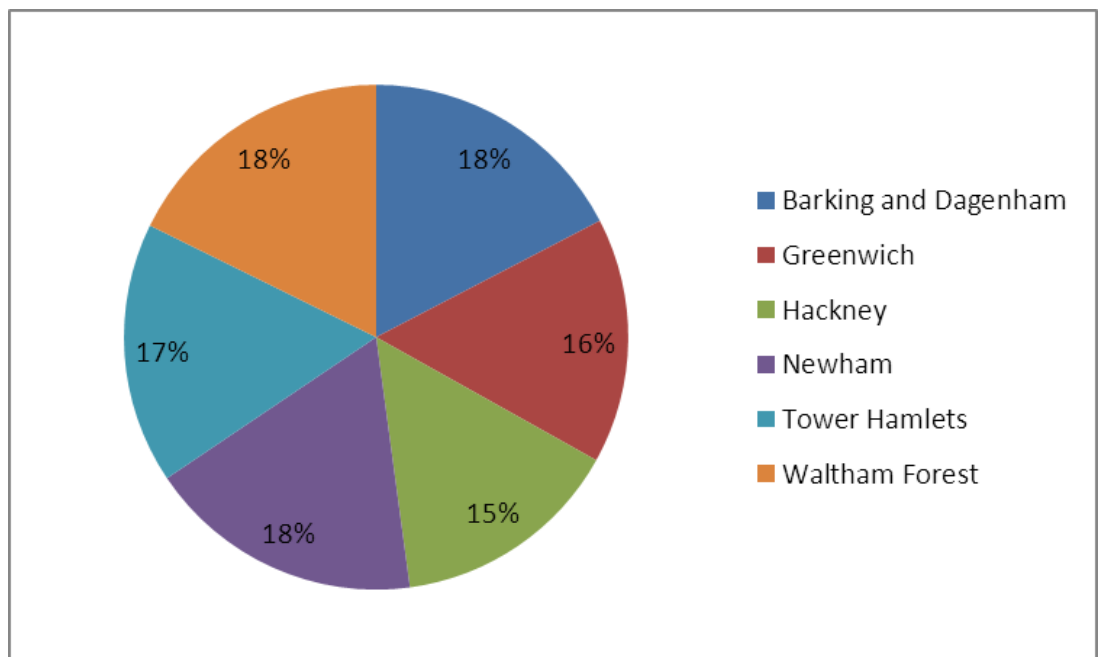


Figure C-2: Gender of survey respondent

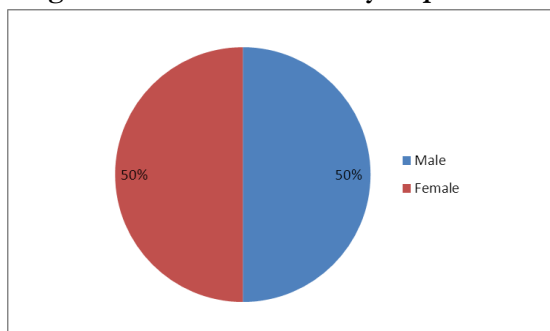
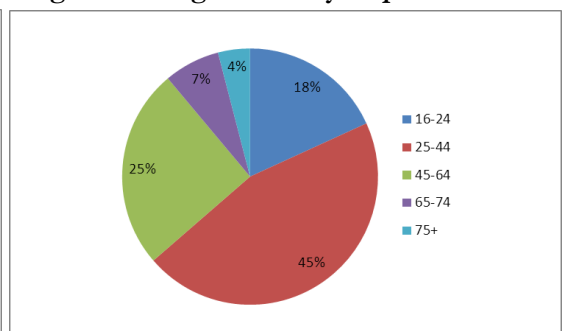
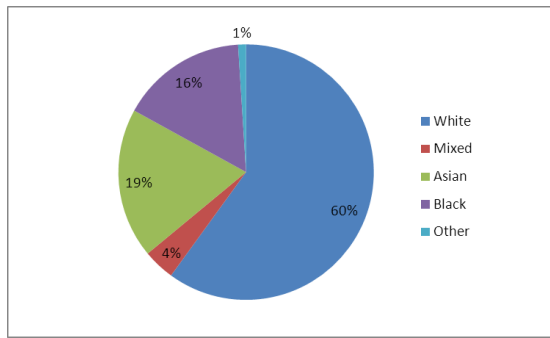


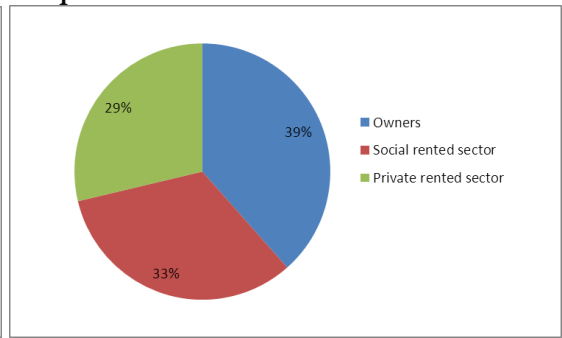
Figure C-3: Age of survey respondent



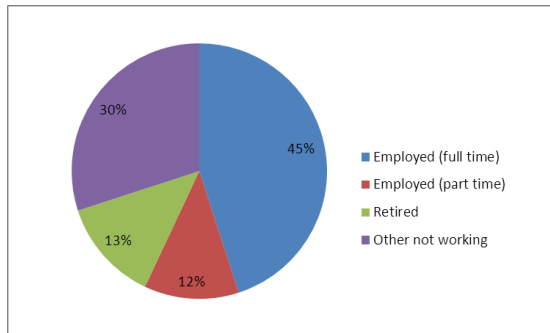
**Figure C-4: Ethnicity of survey respondent**



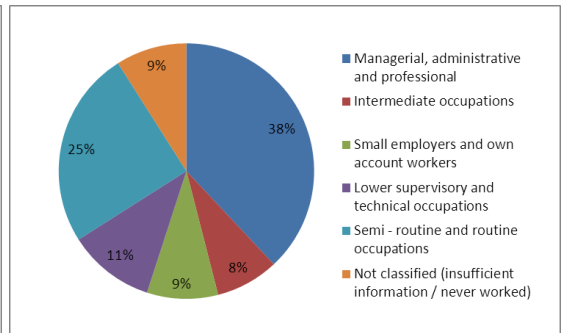
**Figure C-5: Housing tenure of survey respondent**



**Figure C-6: Employment status of survey respondent**



**Figure C-7: Occupational grouping of survey respondent**

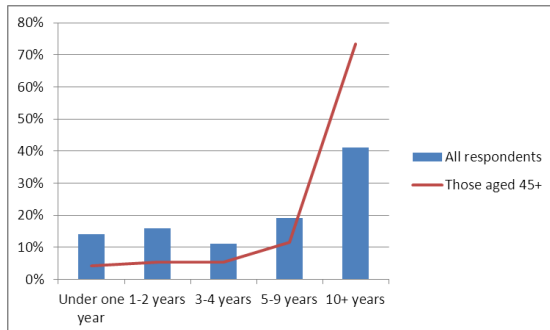


**(ii) Mobility to the new area**

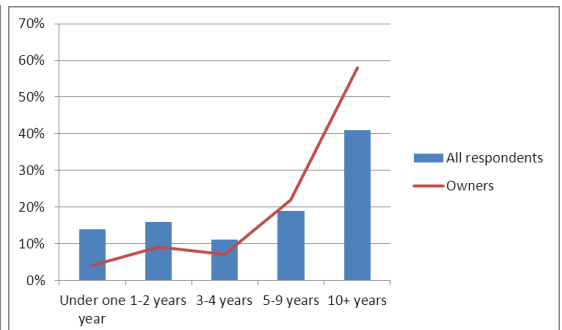
Respondents were asked how long they had lived at their current address with the majority (60%) stating that they had lived there for over 5 years, 41% of whom had lived there for more than 10 years. Only 14% had lived at their current address for less than a year.

As can be expected there appears to be a correlation between the length of time at the current address and tenure: with 79% of owners living at their current address for more than 5 years, 58% of whom had lived there for more than 10. As well as a correlation with the age of the respondent: with 85% of the respondents aged over 45 living at their current address for more than five years 73% of whom had lived there for more than 10 years (see Figure C-8).

**Figure C-8: Length of time at current address – all respondents and those aged 45+**



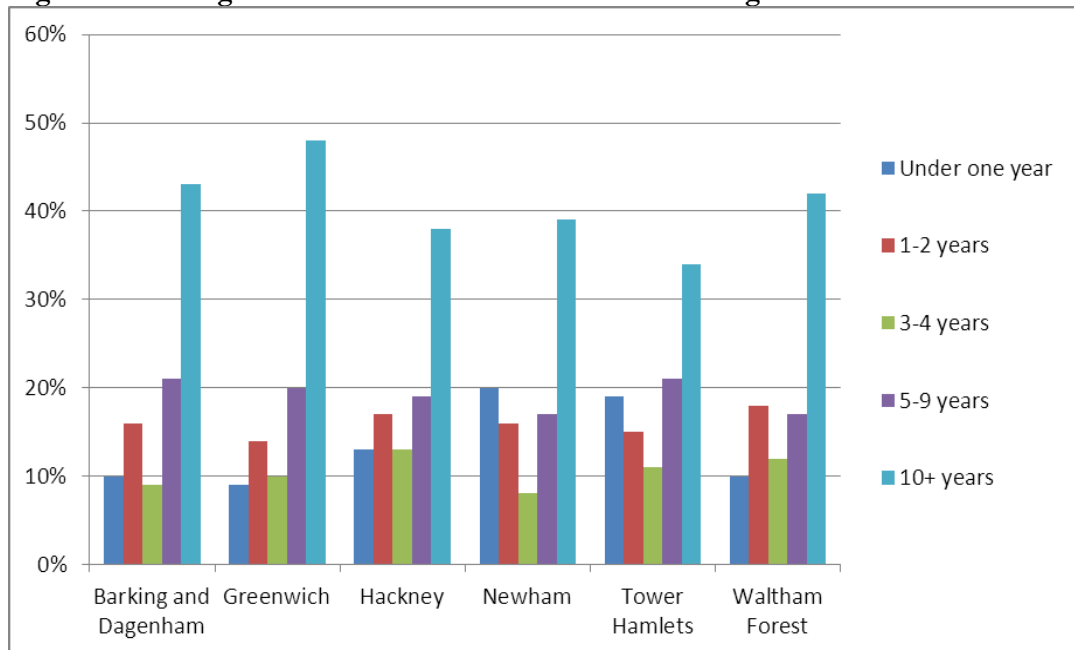
**Figure C-9: Length of time at current address – all respondents and owners**



Looking at the results for each of the six host boroughs it would appear that respondents living in Newham and Tower Hamlets are more 'mobile' than those in Barking and Dagenham and Greenwich: a fifth of the respondents who lived in Newham (20%) and Tower Hamlets (19%) had lived at their current address for less than a year compared to only a tenth in Barking and Dagenham (10%), Greenwich (9%); and at the other end of the scale 43% and 48% of

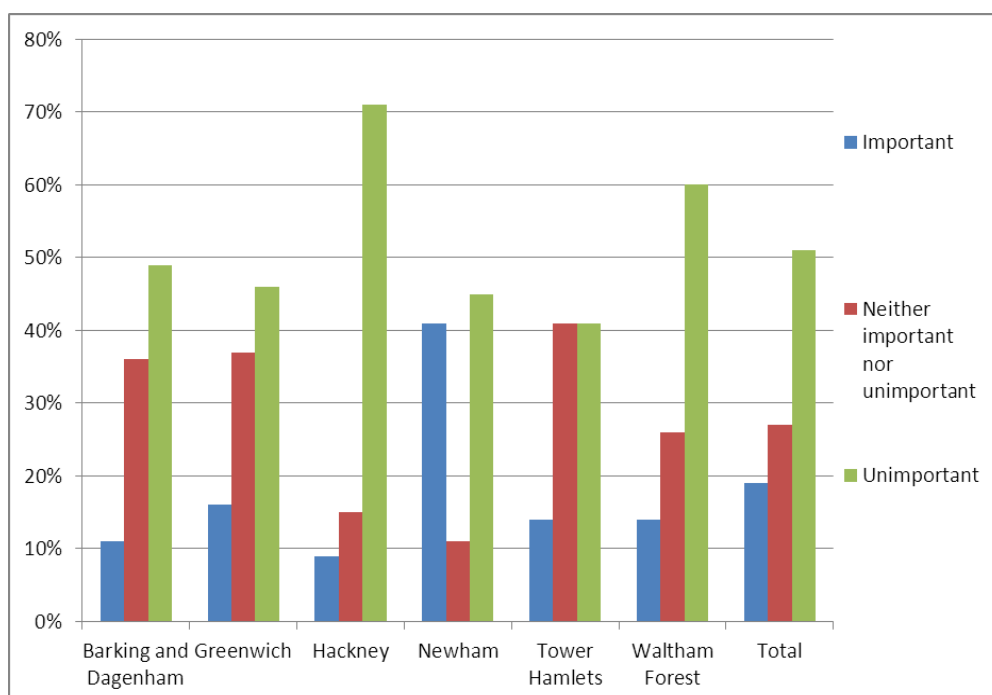
respondents had lived in Barking and Dagenham and Greenwich respectively for more than 10 years compared to only 39% in Newham and 34% in Tower Hamlets. There will be a number of factors behind these results including – but not limited to – the nature of the existing housing stock, the number of new homes being built and the proximity to central London.

**Figure C-10: Length of time at current address – host boroughs**



Of those who had lived at their current address for less than 5 years (40% of all respondents), just over a third (38%) had lived in the same borough for more than 5 years, of which a quarter (24%) had lived there for more than 10 years. A finding, which means that in total three-quarters of respondents (75%) had lived in the same borough for more than 5 years. This 'total' figure mirrored the pattern noted above in terms of the individual boroughs with respondents in Greenwich (82%) and Barking and Dagenham (78%) more likely to have lived in the borough for more than five years than those in Newham (70%) or Tower Hamlets (68%).

The respondents who had moved into the borough they currently live in within the last 5 years were asked how important the regeneration of the area as a result of the 2012 Games was in making them decide to move to the borough. A fifth (19%) felt that it was 'important' with 51% saying that it was 'unimportant'. This pattern was broadly reflected across the host boroughs with the exception of Newham where 41% of respondents felt that the regeneration resulting from the Games was 'important' in their decision to move into the area.

**Figure C-11: Importance of regeneration in decision to move into Borough**

Interestingly, of those who felt that the 'regeneration of the area was important' in their decision to move to the borough 52% had lived in the area for less than a year. Although only based on small sample of responses, this finding may suggest that as the regeneration effects of the Games have become more visibly apparent they have yielded a bigger influence on people's decision making with regard to moving into the area.

For those who felt that the regeneration effects of the Games were an 'important' factor in their decision making, the three most commonly cited factors were the improvements to infrastructure/facilities that had resulted (20%); the role the Games played in increasing money/revenue/business and being generally good for the economy (17%); and the transport improvements (14%).

### (iii) Culture

Over the last 12 months, 62% of all respondents had done some form of 'cultural' activity; a proportion that shrunk to 50% for the non-white population and rose to 70% for the 'white' population. Respondents who lived in Newham were also less likely to have done some 'cultural' activity – 47% had done 'none' – within the last 12 months compared to residents in Hackney (27%) and Greenwich (33%).

The most common 'cultural' activities – with over 100 respondents citing that they had done them within the last year – were:

- Reading books<sup>234</sup> for pleasure – 602 (46%) respondents;
- Buying novels, books, poetry or plays for themselves – 398 (30%) respondents;
- Painting, drawing, printmaking or sculpture – 127 (10%) respondents;
- Playing a musical instrument for pleasure – 123 (9%) respondents;
- Photography as an artistic activity<sup>235</sup> - 103 (8%) respondents;
- Buying original handmade craft (eg pottery or jewellery) for themselves – 102 (8%) respondents.

<sup>234</sup> Not newspapers, magazines or comics.

<sup>235</sup> Not family or holiday 'snaps'.



In the last 12 months 64% of respondents had been to a 'cultural' event, and again respondents living in Newham were less likely – 46% had been to 'none' – to have been to a cultural event within the last 12 months compared to residents in Hackney (29%) and Greenwich (29%).

The most common 'cultural' events – with over 100 respondents citing that they had been to them within the last year – were:

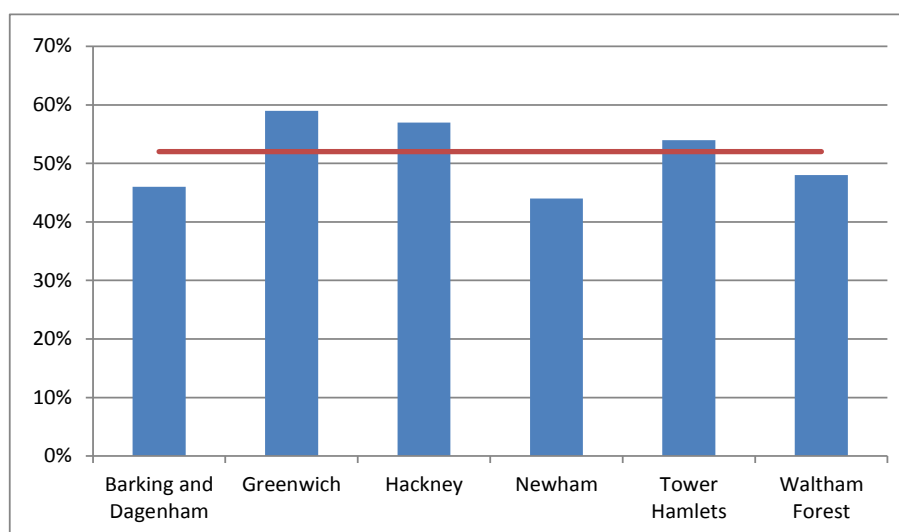
- A film at a cinema or other venue – 648 (49%) respondents;
- A live music event – 223 (17%) respondents;
- A play/drama – 222 (17%) respondents;
- An exhibition or collection of art, photography or sculpture – 206 (16%) respondents;
- A musical – 205 (16%) respondents;
- A public art display or installation – 124 (9%) respondents;
- Street arts – 119 (9%) respondents;
- A carnival – 116 (9%) respondents.

Just under half (44%) of all respondents had used a public library service at least once during the last 12 months. This figure rose for females (50%), those aged 16-24 (52%), those in part-time employment (58%) and the non-white population (53%). Greenwich residents were also more likely to have used a library service in the last 12 months (53%) than any of the other host boroughs, and notably more likely than those who lived in Waltham Forest (36%).

Of those who did use a library service in the last 12 months, 89% did so in their 'own time', with over half (57%) doing so at least once a month – 21% of whom went weekly. By contrast only 5% of respondents had been to an archive centre or records office in the last 12 months.

In the past 12 months, 52% of respondents had visited a 'cultural' place. This fell to 38% for the non-white population and 35% for those with a long standing illness, disability or infirmity. Across the host boroughs the figures ranged from 59% in Greenwich to 44% in Newham, with residents in Barking and Dagenham (46%) and Waltham Forest (48%) more likely to not have visited a 'cultural' place than to have visited one. In Hackney (57%) and Tower Hamlets (54%) the converse was true.

**Figure C-12: Proportion of respondents that had visited a cultural place within the last 12 months**



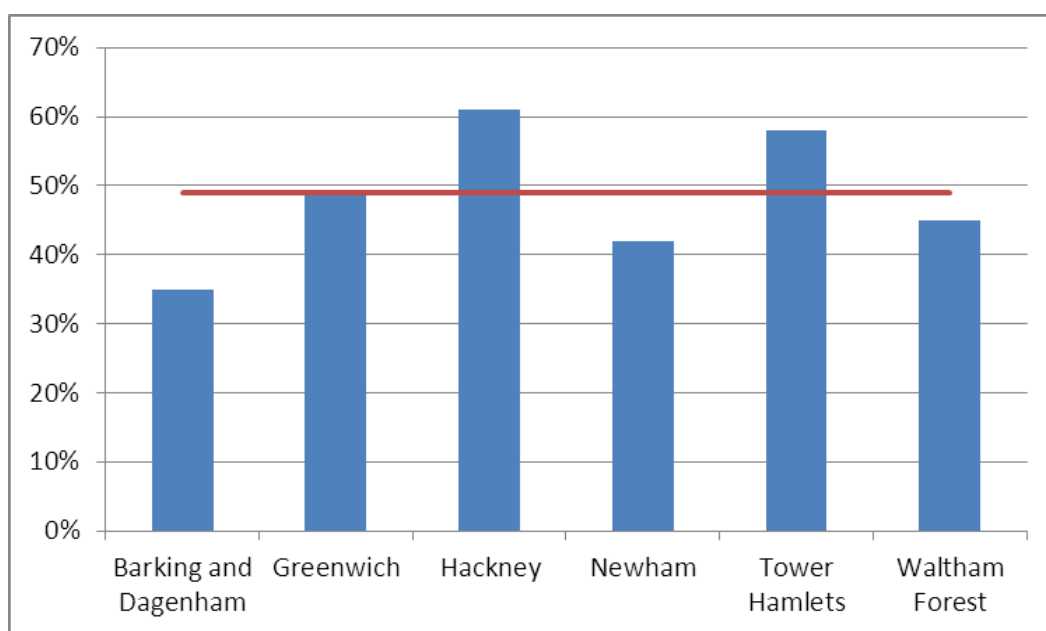
*Note: Red line shows the total for all respondents*

The most common 'cultural' places – with over 100 respondents citing that they had visited them within the last year – were:

- A city or town with historic character – 396 (30%) respondents;
- An historic park or garden open to the public – 393 (30%) respondents;
- An historic building open to the public (non-religious) – 309 (23%) respondents;
- A monument such as a castle, fort or ruin – 261 (20%) respondents;
- An historic place of worship attended as a visitor (not to worship) – 179 (14%) respondents;
- A place connected with industrial history<sup>236</sup> or an old historic transport system<sup>237</sup> – 122 (9%) respondents.

Half (49%) of the respondents had also attended a museum or gallery at least once in the last 12 months – a figure that varied significantly across the host boroughs from as low as 35% in Barking and Dagenham to as high as 61% in Hackney (see Figure C-13). 'White' respondents were also more likely to have attended a museum or gallery in the last 12 months than non-white (57% compared to 37%); as were those in full time employment (54%) compared to those respondents who were retired (34%). Nearly all (95%) of those who had attended a museum or gallery had done so in their own time, but only 16% had attended a museum or gallery at least once a month, with a third (31%) attending on average 3 or 4 times a year.

**Figure C-13: Proportion of respondents that had visited a museum or gallery within the last 12 months**



*Note: Red line shows the total for all respondents.*

#### **(iv) Sports participation**

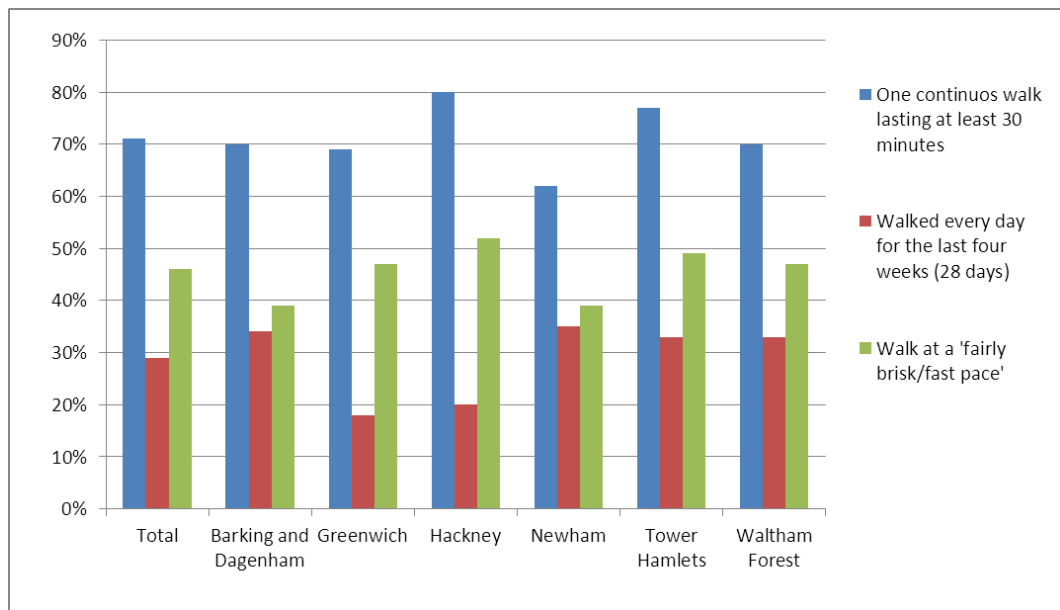
Nearly three-quarters (71%) of the respondents had done at least one continuous walk lasting at least 30 minutes in the last four weeks. With respondents living in Hackney more likely (80%) to have done so than those living in Newham (62%). Those who had actively engaged with the Games were also more likely (81%) than those who have not (66%).

Of those respondents that had done at least one continuous walk lasting at least 30 minutes, 29% had done so every day of the last four weeks, 13% of whom said that they did so for health reasons. Nearly half (46%) said that they walked at a 'fairly brisk/fast pace' with the remainder (44%) walking at a 'steady average pace'.

<sup>236</sup> For example an old factory, dockyard or mine.

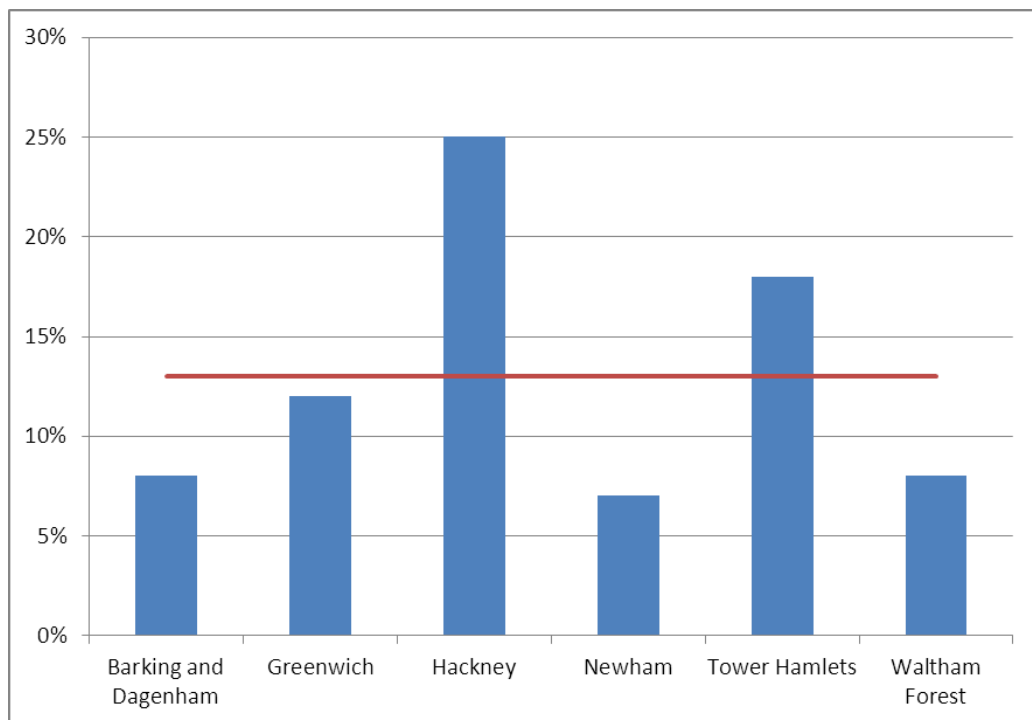
<sup>237</sup> For example an old ship or railway.

**Figure C-14: Proportion of respondents that had walked for 30 minutes: in the last four weeks; every day; at a 'fairly brisk/fast' pace**



Thirteen per cent of respondents had done a least one continuous cycle ride lasting at least 30 minutes in the last four weeks. This figure rose to 20% for those in the 25-44 age bracket and to 25% for those living in Hackney – this was in stark contrast to only 7% of respondents who lived in Newham and 8% of respondents who lived in Barking and Dagenham and Waltham Forest. Again, those who had actively engaged with the Games were also more likely (20%) to have cycled for at least 30 minutes in the last four weeks than those who have not (10%).

**Figure C-15: Proportion of respondents that had cycled for 30 minutes in the last four weeks**

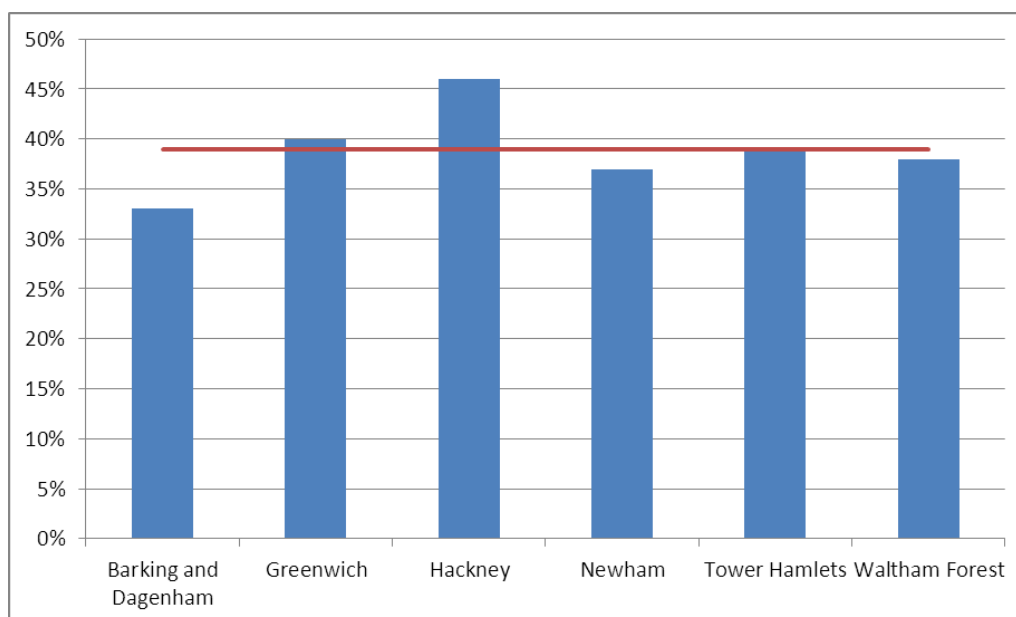


*Note: Red line shows the total for all respondents.*

A third of respondents (39%) had also done some other sporting or active recreation activities in the last four weeks, with men (47%) more likely to have done so than women (31%) and those aged 16-24 (56%) more likely than those in older age brackets (25-44 – 43%; 45-64 – 30%; 65-74 – 18%; and 75+ – 13%). Hackney was again the most 'active' of the host boroughs

with 46% of the respondents who lived there noting that that had done other sporting or active recreation activities. Those actively engaged with the Games were also more likely 53% compared to 33% of those who have not had any engagement with the Games.

**Figure C-16: Proportion of respondents that had done some sporting or active recreation in the last four weeks**



Note: Red line shows the total for all respondents.

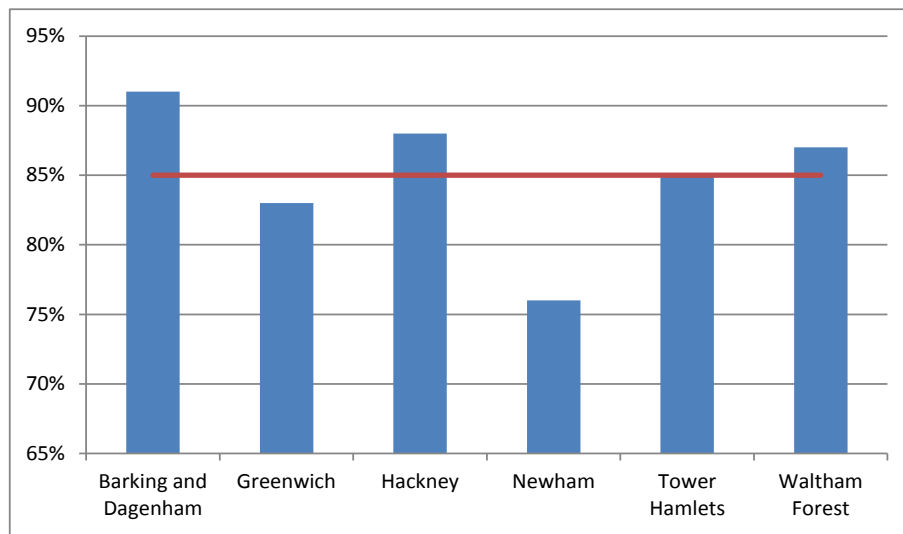
The most common sports – with over 100 respondents citing that they had visited them within the *last year* – were:

- Swimming or diving (indoors) – 303 (23%) respondents;
- Health, fitness, gym or conditioning activities – 276 (31%) respondents;
- Cycling – 163 (12%) respondents;
- Football (including 5-a-side and 6-a-side) – 161 (12%) respondents;
- Jogging, cross country and road running – 161 (12%) respondents;
- Keep-fit, aerobics and dance exercise (including exercise bikes) – 119 (9%) respondents.

Taking these findings together (ie walking, cycling and other sporting or active recreation), a total of 51% of respondents had done some form of active sport in the last four weeks, 83% of whom said that it was enough to raise their breathing rate.

Eight-five per cent of respondents cited that they can get to a sports facility within 20 minutes (either by walking or some other form of transport). This figure did however vary across the host boroughs with 91% of respondents in Barking and Dagenham stating that this was the case, compared to only 76% in Newham.

**Figure C-17: Proportion of respondents that can get to a sports facility within 20 minutes**

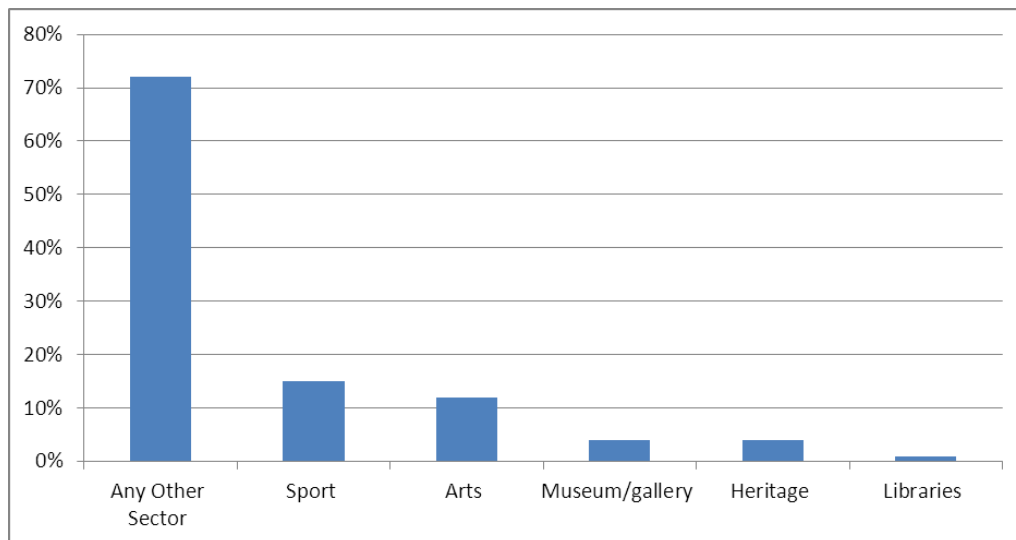


Note: Red line shows the total for all respondents.

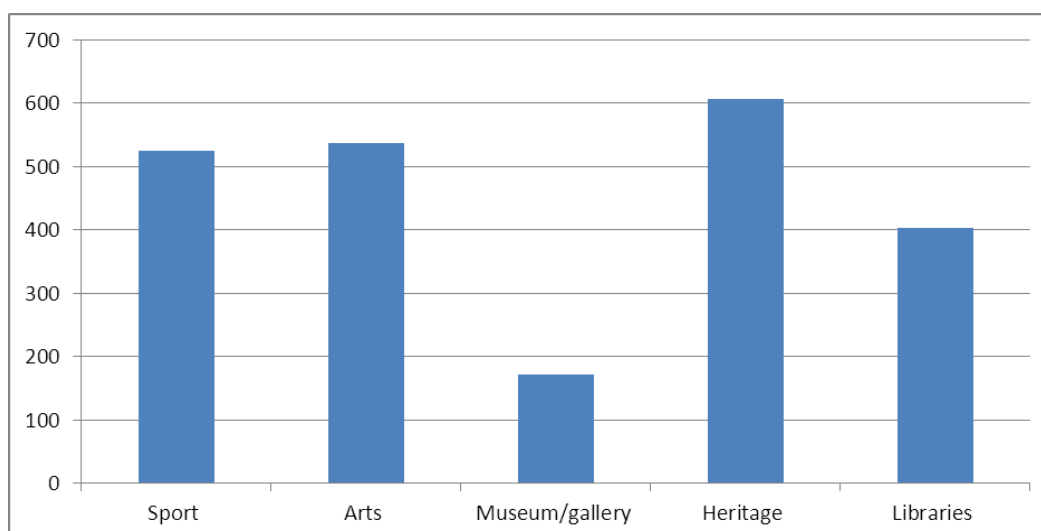
**(v) Volunteering**

Twenty-one per cent of respondents had done some voluntary work during the last 12 months a figure that was broadly consistent across age, working status and ethnicity as well as across the six host boroughs. The only notable difference was between those who had actively engaged with the Games and those that had not (34% compared to 15%). Interestingly, a significant majority (72%) had volunteered in a sector 'other' than those directly asked about, with the next largest proportion (15%) volunteering in sport (see Figure C-18).

**Figure C-18: Proportion of respondents volunteering in particular sectors**



In terms of the time spent volunteering in the last four weeks in the particular sectors asked about, respondents had spent between 172 minutes (just under 3 hours) volunteering at a museum/gallery to 607 minutes (just over 10 hours) volunteering in heritage related activities. Across all five sectors the average time was 449 minutes (about 6 and three-quarter hours).

**Figure C-19: Time spent volunteering (minutes) in particular sectors****(vi) Olympic engagement**

When asked what made them proud of Britain the top three answers were:

- The British countryside and scenery – 36%;
- The British health service – 32%;
- British history – 29%.

This view did however differ for some sub-groups. For example, for younger people (aged 16-24) the top three were:

- British education and science – 31%;
- British arts and culture (music, film, literature, art) – 30%;
- The British health service – 29%.

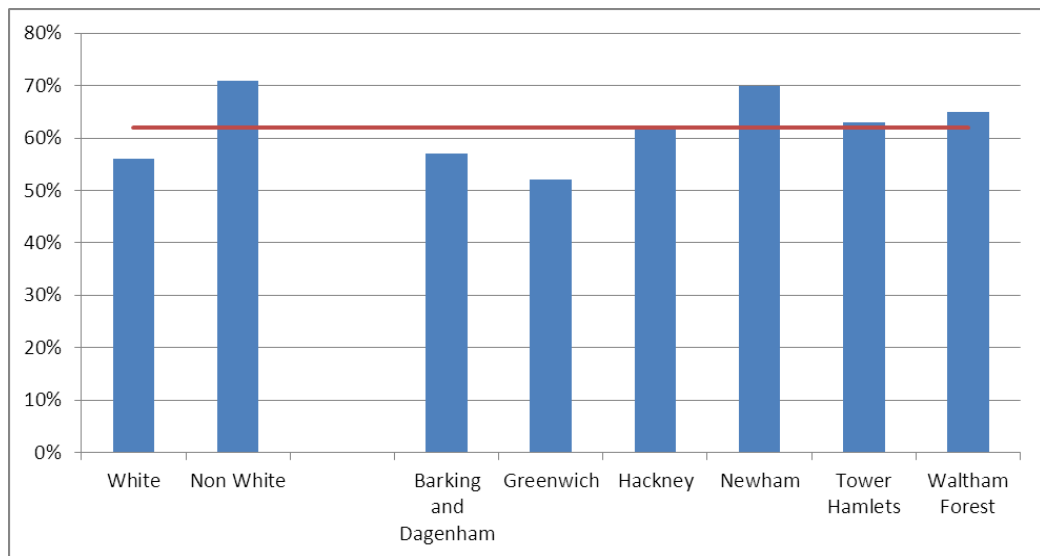
While the non-white respondents felt that the top three reasons were:

- The British health service – 36%;
- British education and science – 34%;
- The British people – 26%.

Nearly two-thirds of the respondents (62%) were supportive of the UK hosting the 2012 Summer Olympic and Paralympic Games in London, 38% of whom were 'strongly supportive'. Only 15% of respondents were against (7% of whom 'strongly against') with 22% ambivalent.

Respondents of non-white ethnicity were notably more supportive (71%) than 'white' respondents (56%). Respondents who lived in Newham (70%) were also more supportive than those in Greenwich (52%). Those that had lived in the area for less than 5 years (71%) were also more supportive than those who had lived in the area for more than 5 years (59%) and – perhaps unsurprisingly – nearly all (91%) of those who thought that the regeneration of the area was important in their decision to move into the area were supportive.

**Figure C-20: Proportion of residents supportive of the UK hosting the 2012 Games in London**

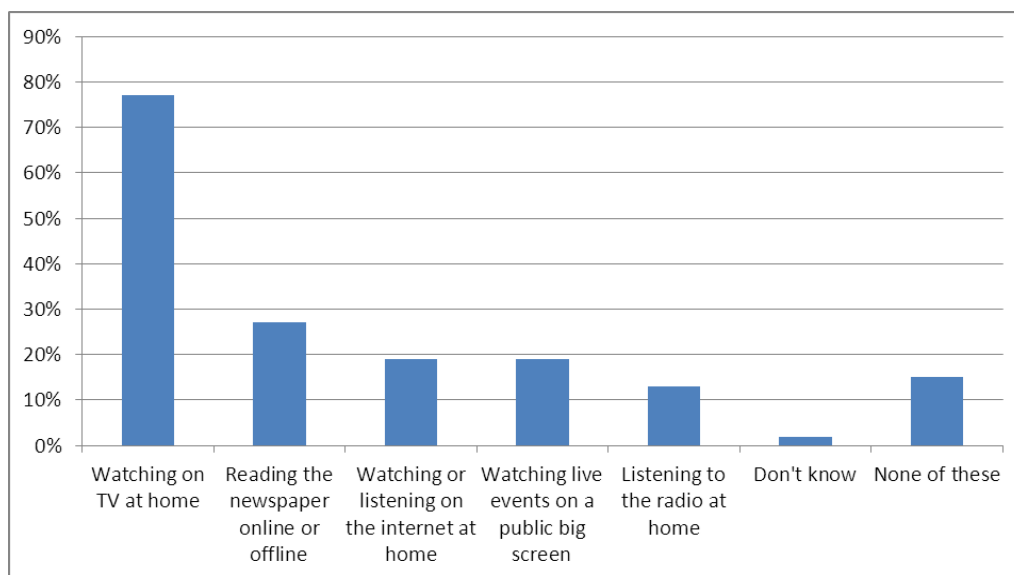


*Note: Red line shows the total for all respondents.*

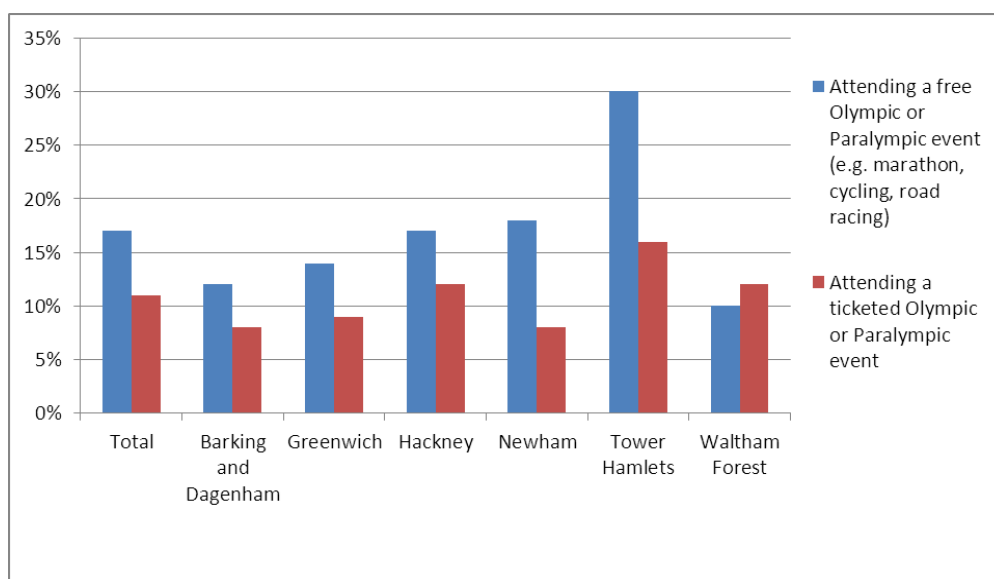
Those respondents who were strongly against the UK hosting the Games in London were asked why with the most commonly cited concerns relating to the costs: 'costs too much' (29%); 'waste of money' (29%), 'money better used elsewhere' (16%). With the main other reason being the fact that they 'do not think UK will do a good job/cannot cope' (21%).

Likewise, those respondents who were strongly supportive of the Games were also asked why, with the most common responses generally focused on the benefits of hosting: 'good for the economy' (31%); 'good for London' (16%); 'good for the country in general' (15%); 'regeneration of the area' (14%); 'good for tourism' (12%).

Eighty-three per cent of respondents 'intend to follow' the Games, the overwhelming majority of whom (77%) intend to do it by 'watching on TV at home'.

**Figure C-21: Means of following the 2012 Games**

In addition, 17% intend to attend a free Olympic or Paralympic event and 11% intend to attend a ticketed event. In terms of attending events – either free or ticketed – respondents who live in Tower Hamlets appear more likely to attend an event than those in the other host boroughs.

**Figure C-22: Proportion of respondents intending to attend Olympic or Paralympic events**

A fifth (18%) of respondents who had done some sport or recreational physical activity in the past 12 months thought that the 2012 Games has motivated them to do more. This finding is particularly true for those aged 16-24 (25%), those not working (24%), those of a non-white ethnicity (29%) and those who live in Newham (30%). The reasons given for this included: 'more interested in sport in general' (50%); encouragement to 'take part in sport more often' (29%); and an introduction 'to new sports' (13%).

Eleven per cent of respondents who had done some cultural activity in the last 12 months, thought that the Games has motivated them to do more – a finding that is more pronounced for the non-white respondents (17%). The reasons behind this increased motivation include: 'more interested in cultural activities in general' (51%); encouragement 'to take part in cultural activities more often' (20%); and an introduction 'to new cultural activities' (19%).



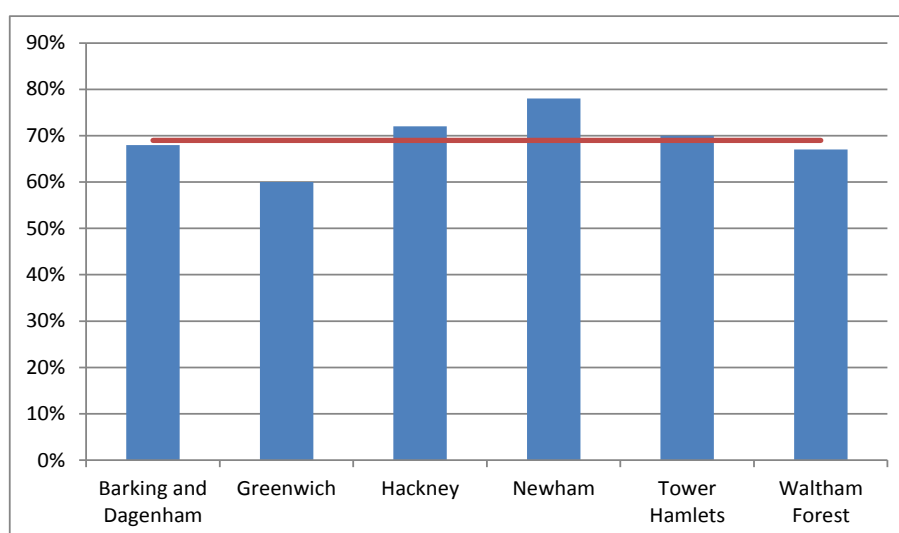
Fifteen per cent of respondents who had done some voluntary work in the last 12 months thought that the Games has motivated them to do more – again this finding was more common in respondents aged 16-24 (22%) and those of non-white ethnicity (27%). The reasons given for why this was the case included: being 'more aware of volunteering opportunities' (35%); and 'being more interested in volunteering' (32%).

#### (vii) Perceptions of the local area

When asked whether they thought that the 2012 Games would be good for London as a whole – based on what they had seen or heard – two-thirds (69%) of respondents felt that it had with 37% 'strongly agreeing'. Nearly a fifth (17%) of respondents disagreed, but only 7% strongly. This headline view was broadly reflected across the different age groups, genders and working status; although in terms of ethnicity, non-white respondents (75%) were notably more positive than 'white' respondents (66%).

Across the six host boroughs opinions varied more significantly with residents of Barking and Dagenham and Greenwich generally less positive than those in Newham (20% and 23% respectively disagreed that the Games would be good for London compared to 11%).

**Figure C-23: Proportion of respondents 'agreeing' that hosting the 2012 Games would be good for London as a whole**

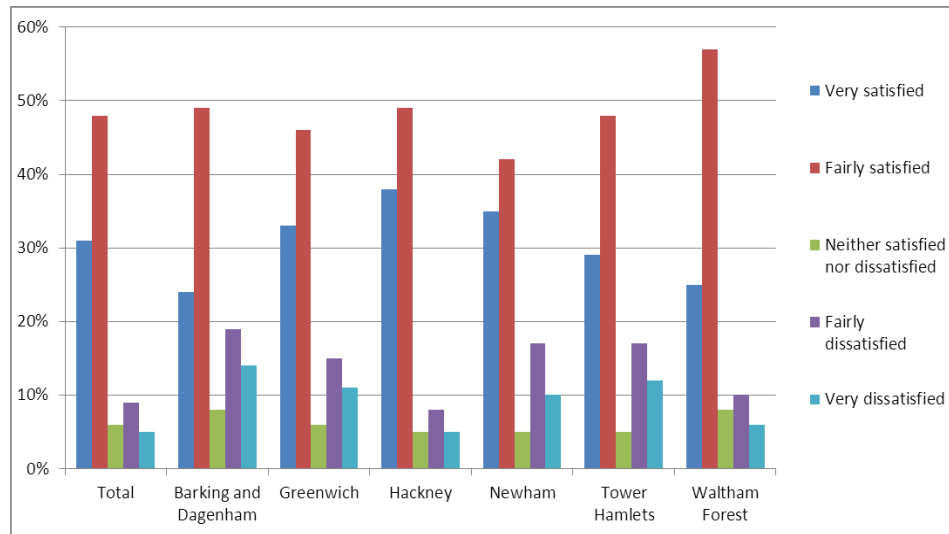


*Note: Red line shows the total for all respondents.*

As could be expected, those respondents that had actively engaged with the Games thought that the Games would be good for London (91%).

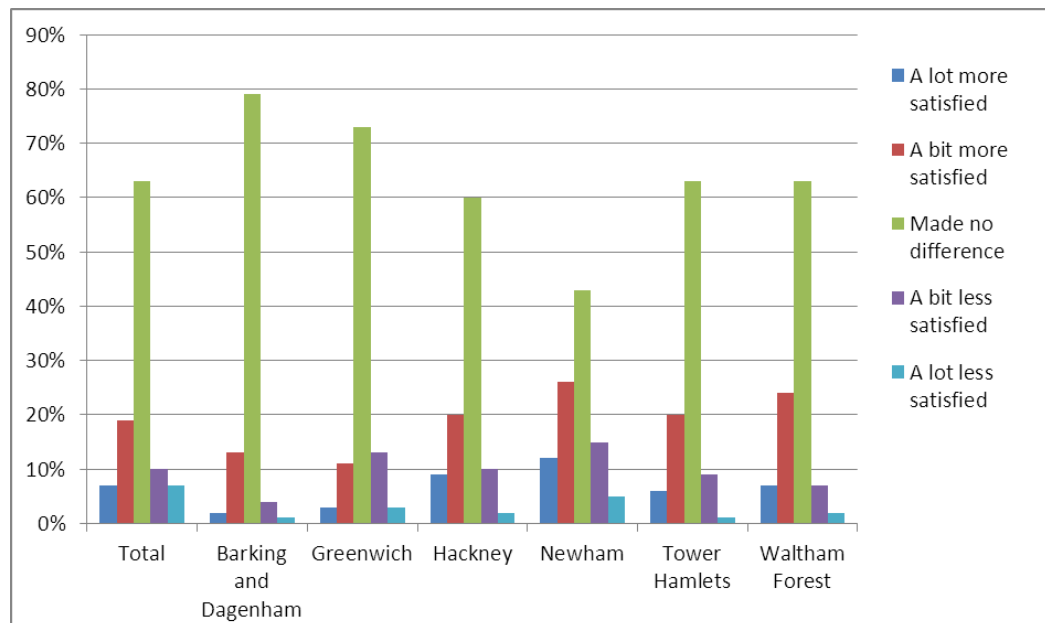
Three quarters (79%) of respondents were satisfied with their local area as a place to live, a third of whom (31%) were 'very satisfied'. Only 5% of respondents were 'very dissatisfied' with their local area as a place to live. Across the host boroughs, those respondents who lived in Hackney were generally more satisfied (87%).

**Figure C-24: Respondent satisfaction with their local area as a place to live**



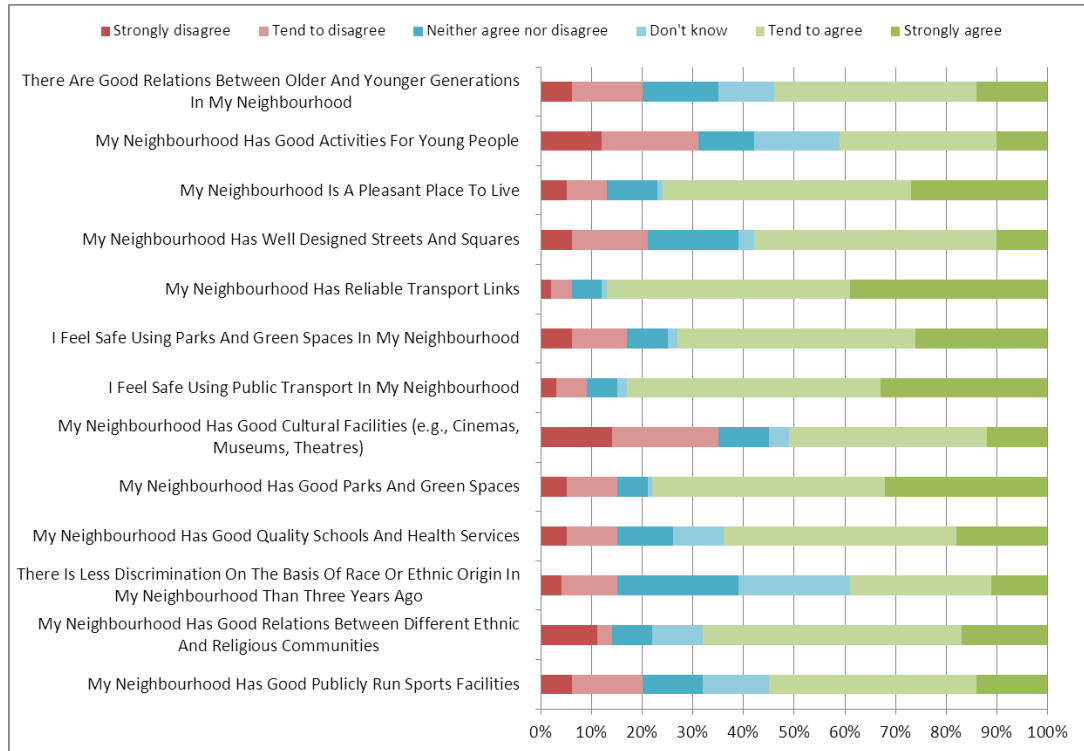
A quarter (26%) of the respondents felt that hosting the Games had made them more satisfied with their area as a place to live, 10% felt that it had made them less satisfied and the majority (63%) felt that it had made no difference. Respondents who lived in Newham were more positive than the other host boroughs with 39% stating that hosting the Games had made them more satisfied with their area as a place to live.

**Figure C-25: Extent to which hosting the Games has made respondents more satisfied with their area as a place to live**



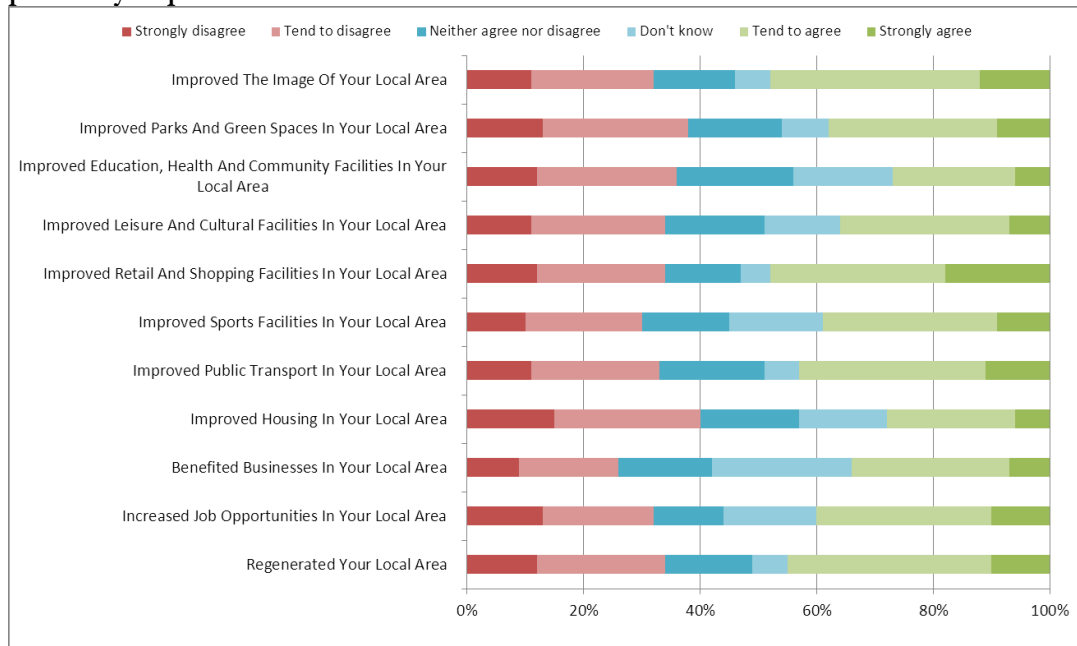
Respondents were asked to comment on the extent to which they agreed with a series of indicators about their neighborhood. On the whole respondents were generally positive with over 50% 'agreeing' with all but two of the indicators: only 39% agreed that "there is less discrimination on the basis of race or ethnic origin" in their neighbourhood; and only 41% agreed that their "neighbourhood has good activities for young people". Conversely over three quarters of respondents felt that: their "neighbourhood is a pleasant place to live" (76%); their "neighbourhood has good parks and green spaces" (78%); they "feel safe using public transport" in their neighbourhood (83%); and that their "neighbourhood has reliable transport links" (87%).

**Figure C-26: Respondent satisfaction with their neighbourhood**



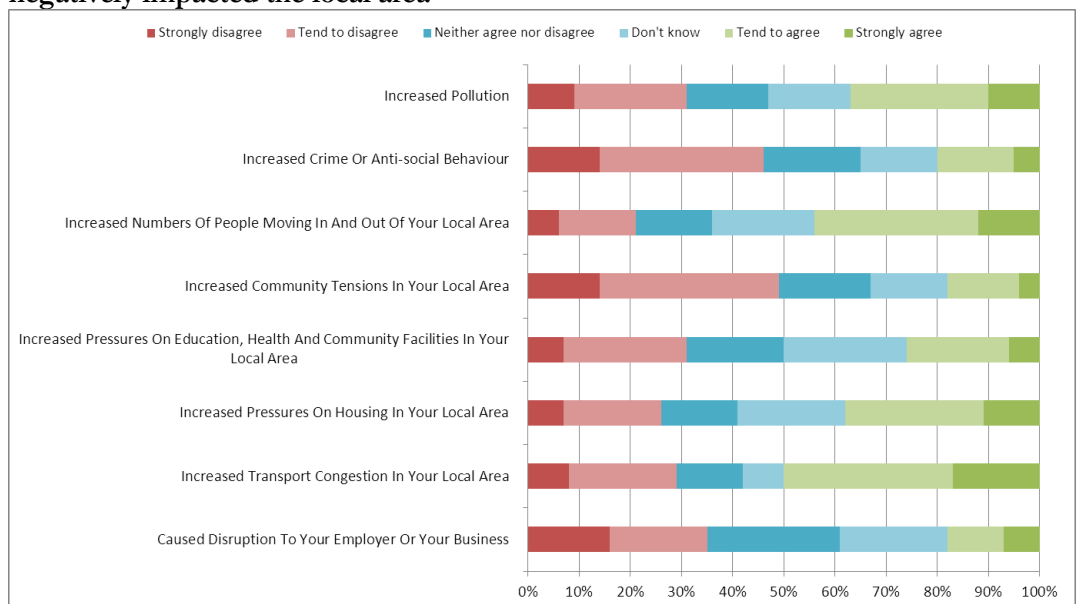
Respondents were also asked to comment on the extent to which the 2012 Games 'have' already and 'will', over the longer term, have both positive and negative impacts on their neighbourhood. Thinking first about the extent to which the preparations of the 2012 Games have already impacted on local neighbourhoods, in terms of the positive impacts, respondents were fairly evenly split, between those that 'agreed' that the Games had impacted and those that 'disagreed' – with no one position supported by more than half of the respondents. The three most significant impacts in the local area to date appear to be the improvement to retail and shopping facilities (with 48% of respondents agreeing); the improvement to the image of the local area (48%) and the improvement to public transport (43%).

**Figure C-27: The extent to which the preparations for staging the 2012 Games have positively impacted the local area**



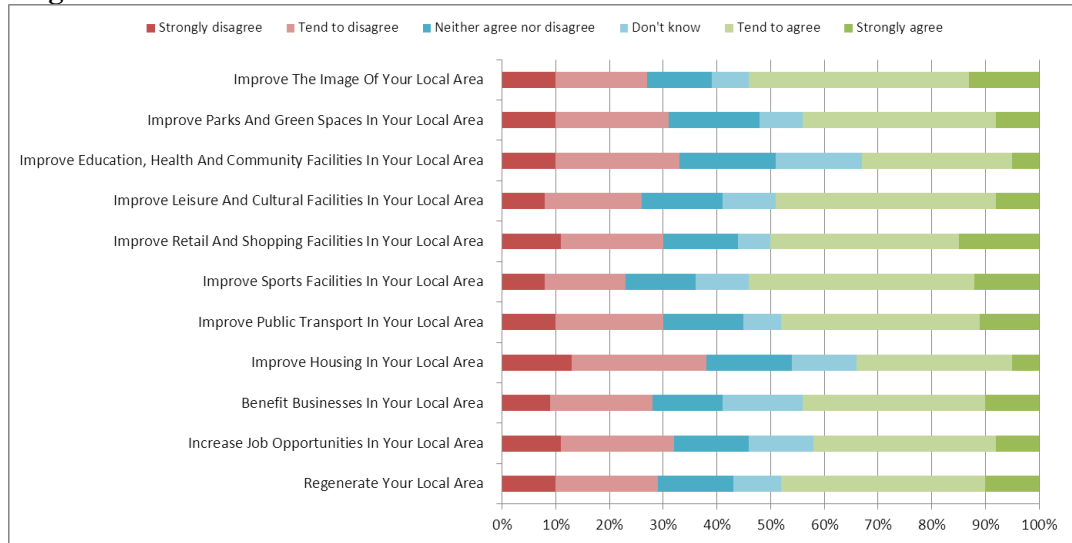
In terms of the negative impacts to date, respondent views were again mixed (see Figure C-28). Half of the respondents agreed that the preparations for staging the Games had increased transport congestion in the area (50%) and 44% felt that the Games had increased the numbers of people moving in and out of the area. Conversely, 49% felt that the preparation for the Games had not increased community tension and 46% felt that it had not increased crime or anti-social behavior.

**Figure C-28: The extent to which the preparations for staging the 2012 Games have negatively impacted the local area**



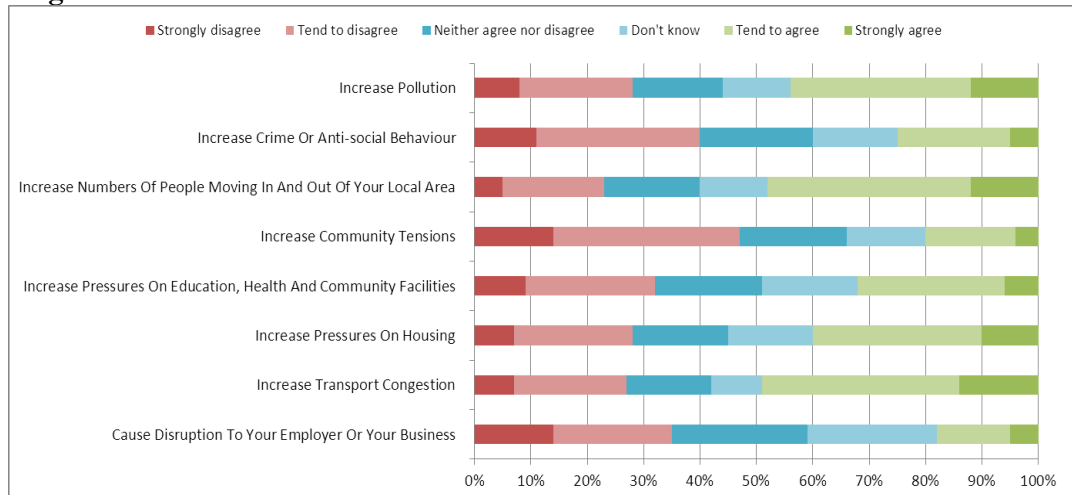
Thinking longer term, respondents were more positive (see Figure C-29). Over half of the respondents 'agreed' that the long-term impacts of the 2012 Games will: improve the image of the local area (54%); improve sports facilities in the local area (54%); and improve retail and shopping facilities in the local area (50%). There were only two factors where more respondents disagreed than agreed and these were the extent to which the Games will improve housing in the local area (38% thought that it wouldn't compared to 34% who thought that it would) and the extent to which it will improve education, health and community facilities (where the same proportion of respondents (33%) thought that it wouldn't as those who thought that it would).

**Figure C-29: The extent to which the 2012 Games will positively impact – over the longer term – on the local area**



With regard to the negative factors, increased transport congestion (49%) and increased numbers of people moving in and out of the area (48%) remained the two most common longer term concerns, with respondent views generally mixed across the remaining factors.

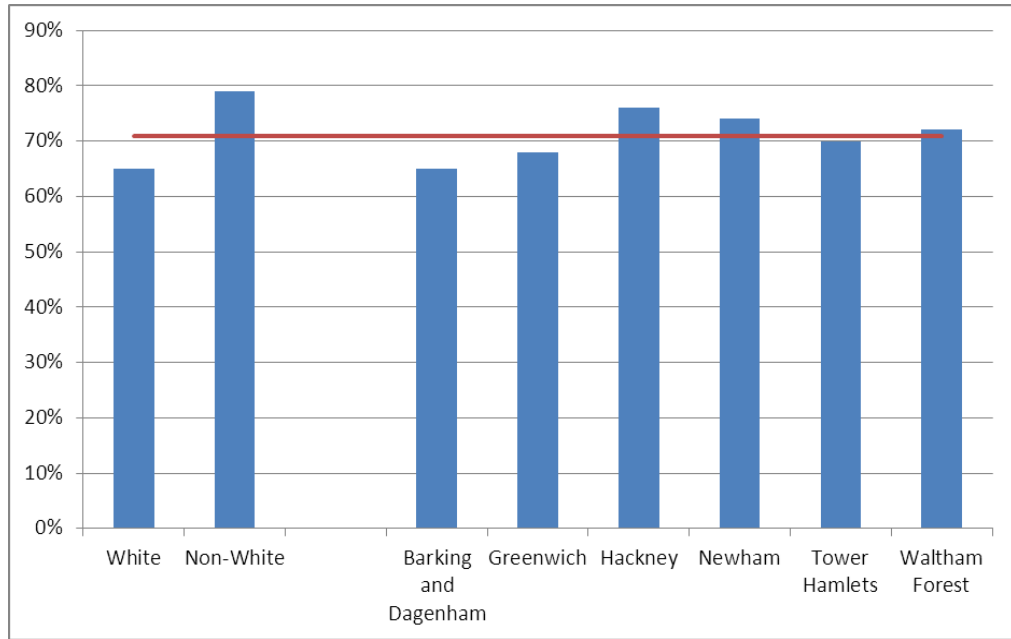
**Figure C-30: The extent to which the 2012 Games will negatively impact – over the longer term – on the local area**



**(viii) Community cohesion**

Seventy-one percent of respondents felt that they 'belonged' to their local area, a finding that was again more true for non-white (79%) respondents than 'white' respondents (65%), and across the six host boroughs the figures ranged from 76% in Hackney to 65% in Barking and Dagenham.

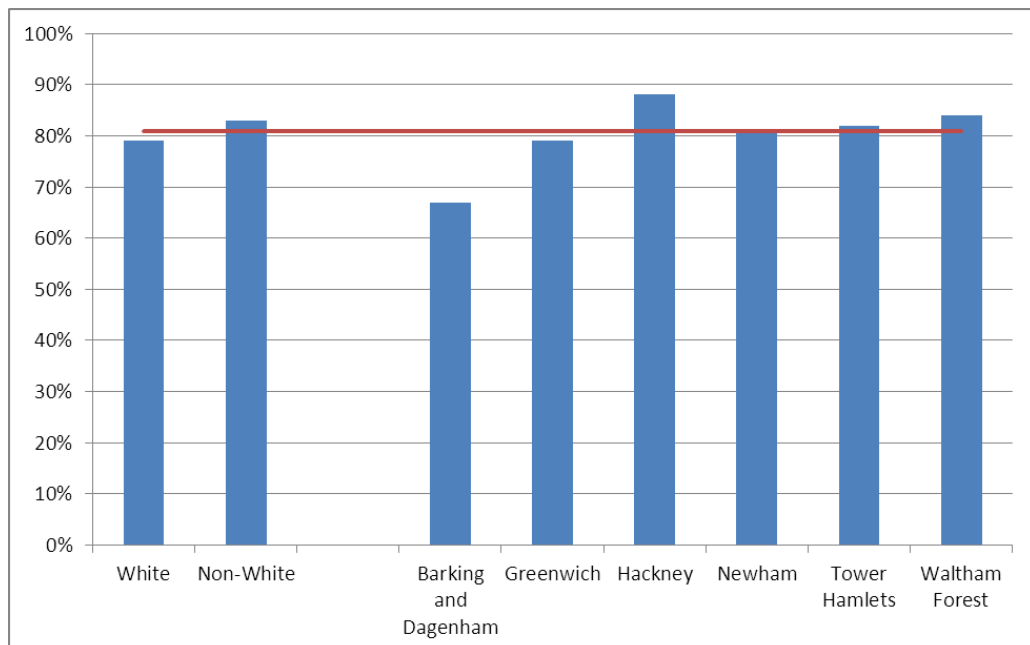
**Figure C-31: Proportion of respondents 'agreeing' that they 'belong' to the local area**



Note: Red line shows the total for all respondents.

Eighty-one per cent of respondents agreed that their local area was a place where people from different backgrounds 'get on well together' – a view that was supported by both the 'white' (79%) and non-white (83%) respondents alike. However, there was again significant variation between the six host boroughs with a 21 percentage point difference between Hackney – the highest at 88% – and Barking and Dagenham – the lowest at 67%.

**Figure C-32: Proportion of respondents 'agreeing' that from different backgrounds get on well together**

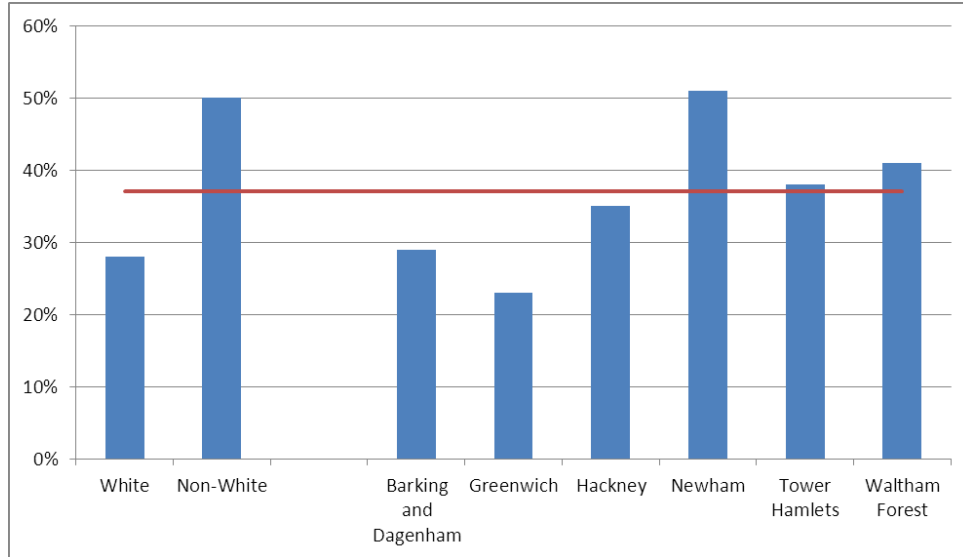


Note: Red line shows the total for all respondents.

Over a third (37%) of respondents agree that the Games has made people from different backgrounds in their local area get on better; while the same proportion disagree. Here the views of non-white and white respondents differ: with 50% of the non-white respondents agreeing and only 29% disagreeing compared to 28% and 42% respectively for the 'white' respondents.

Again, there is a disparity of views across the host borough with respondents living in Newham more likely to agree (51%) and less likely to disagree (27%), as opposed to respondents living in Barking and Dagenham who were less likely to agree (29%) and more likely to disagree (49%).

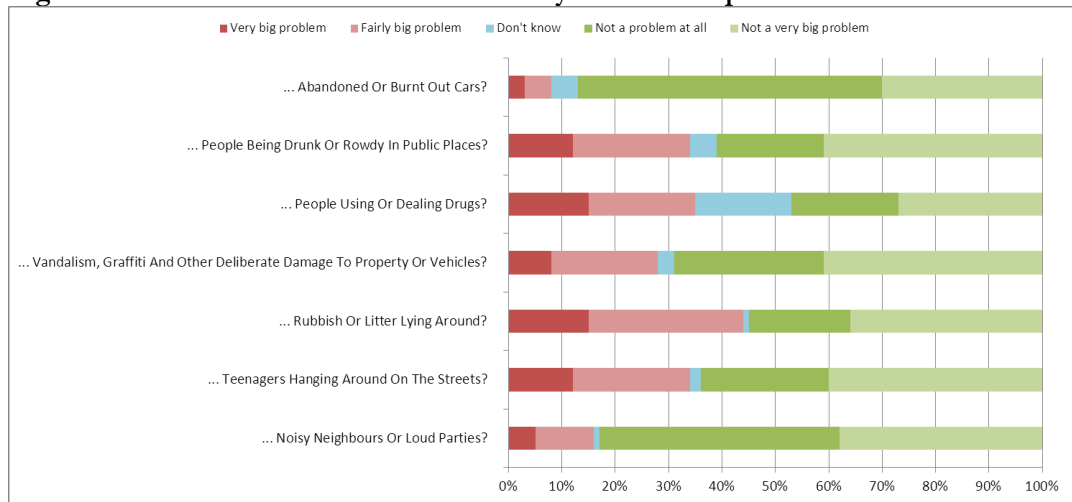
**Figure C-33: Proportion of respondents 'agreeing' that the 2012 Games has made people from different backgrounds get on better**



Note: Red line shows the total for all respondents.

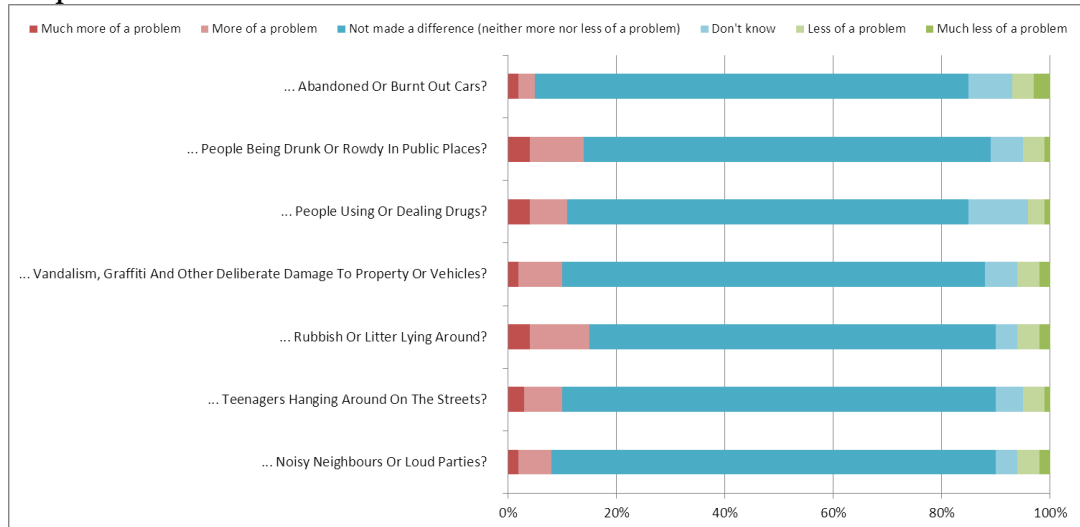
When asked about a series of specific community issues (see Figure C-34) the majority of respondents did not view them as a problem in the local area.

**Figure C-34: The extent to which community issues are a problem in the local area**



Perhaps more significantly, an overwhelming majority of respondents felt that the preparations for hosting the 2012 Games had made no difference to these problems in the local area.

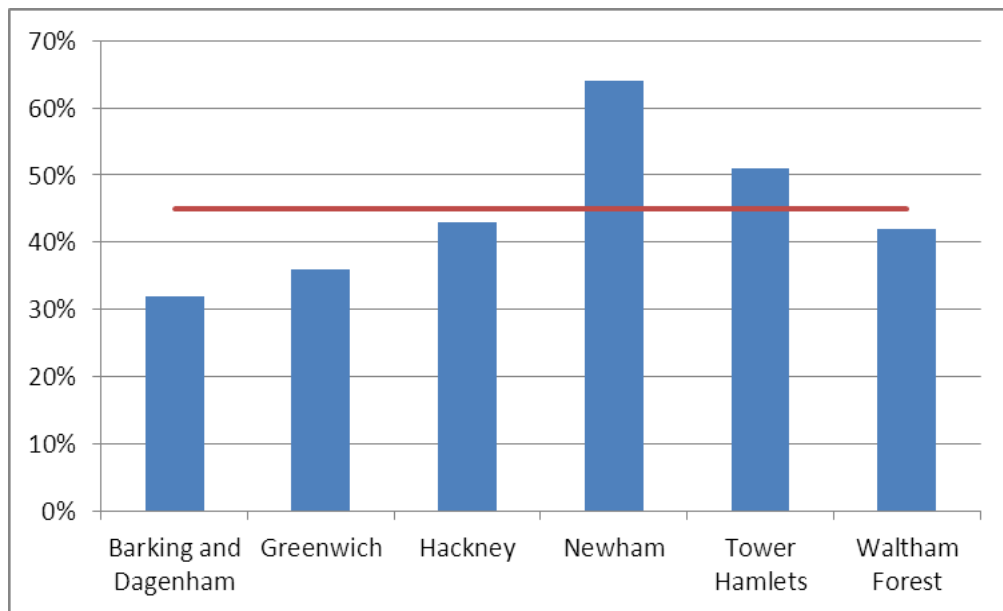
**Figure C-35: The extent to which the preparation of the 2012 Games have exacerbated the problems in the local area**



**(ix) Access to jobs**

Just under half (45%) of the respondents agreed that the hosting of the 2012 Games in East London had increased the number of jobs available to local residents; 29% disagreed and 13% neither agreed nor disagreed or didn't know. Those respondents aged 16-24 were notably more likely to agree (60%) than those respondents in other age groups. While those respondents who lived in Newham and Tower Hamlets were also more likely to agree (64% and 51% respectively) than those in Barking and Dagenham (32%) and Greenwich (36%) (see Figure C-36).

**Figure C-36: Proportion of respondents 'agreeing' that the 2012 Games has increased the number of jobs available to local residents**



Note: Red line shows the total for all respondents.

These responses are likely to be related in part to the fact that only 4% of respondents had directly (either personally (2%) or through members of their household (2%)) benefited from employment opportunities – lasting or due to last more than one year – resulting from the preparation of the Games: 2% on the Olympic Park; 1% in at Olympic venues and facilities; and 1% at Westfield Shopping Centre.



Four per cent of respondents also noted that they had benefited (either personally (2%) or through a member of the household (2%) from employment opportunities related to the Games that have or are due to last for less than a year.

Taken together these results suggest that 7% of respondents benefited (either personally (3%) or through someone in their household (4%) from employment opportunities related to the preparations for the 2012 Games.

For the 3% of respondents who personally secured employment:

- 40% noted that they needed to be trained in new skills;
- 78% were already in work, education or training;
- 22% were unemployed – 7% of whom were unemployed for more than six months and a further 8% who were unemployed for more than a year.

For the 4% of household members who secured employment:

- 38% needed to be trained in new skills;
- 81% were already in work, education or training;
- 12% were unemployed – 4% of whom were unemployed for more than a year.

#### **(x) Green issues and sustainability**

Prior to being asked the question, 29% of respondents were aware that the 2012 Games are aiming to be the greenest ever.

Of those respondents who knew about this aim, three-quarters (78%) said that the Games had not caused them to change their behaviors with regard to sustainability, with the 21% for whom it had prompted a change noting that it had prompted them to:

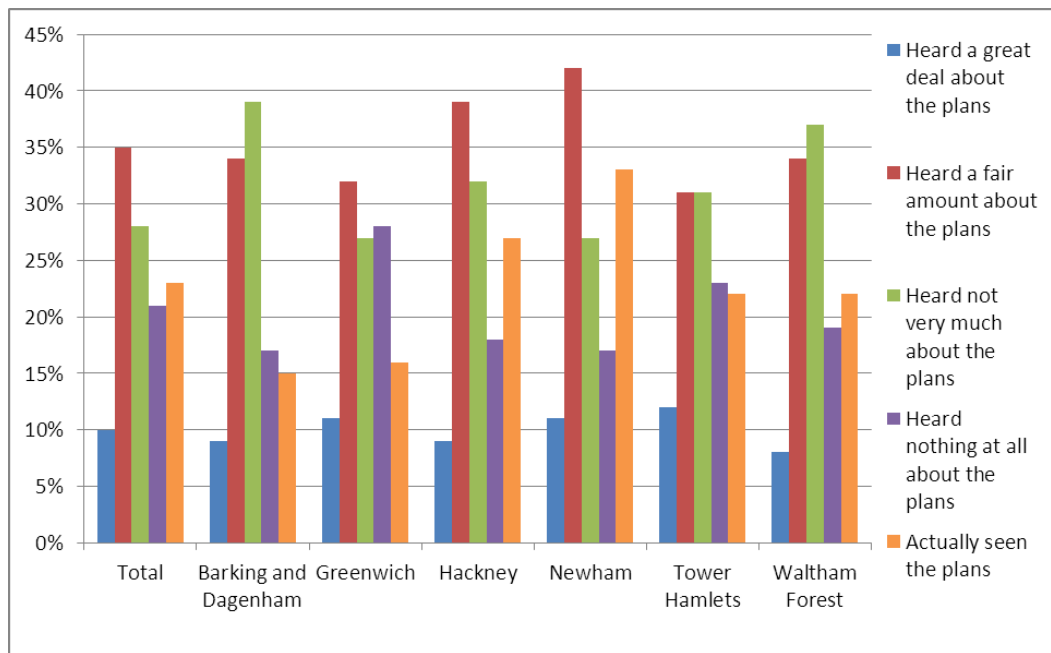
- Increase recycling – 10%;
- Protect their local environment – 10%;
- Conserve water/reduce water wastage – 7%;
- Improve environmental friendly transport behaviour – 7%;
- Reduce energy consumption – 4%;
- Change their attitudes to sustainability – 3%.

#### **(xi) Satisfaction with Park Legacy plans and the consultation process for Park Master Plans**

Just under half of the respondents (45%) had heard about the plans to improve the Olympic Park and the surrounding area a 'great deal' or a 'fair amount', with only a quarter (23%) of respondents having seen the plans to improve the Olympic Park area. A fifth of respondents (21%) had heard 'nothing at all'.

A larger proportion of respondents in Newham had seen the plans to improve the Olympic Park area than (33%) than those who lived in Barking and Dagenham (15%) or Greenwich (16%). This is also reflected in the fact that 53% of the respondent who live in Newham had heard a 'great deal/a fair amount' about the plans compared to 43% in both Barking and Dagenham and Greenwich (see Figure C-37).

**Figure C-37: The extent to which respondents that had heard about – and seen – the plans of the Olympic Park**



In terms of where respondents had seen the plans: 31% had seen them in a newsletter; 19% had seen them at a local exhibition; 15% had seen them in a 'community brief' document; and 49% had seen them in an 'other' format.

A quarter (23%) of the respondents are satisfied with the community consultation process on the plans for the Olympic Park and surrounding area and the opportunity to input their views, with 18% dissatisfied and 37% neither satisfied nor dissatisfied. The proportion of satisfied respondents rises to 40% for those who live in Newham and falls to 15% for those who live in Barking and Dagenham.

In terms of specifics, of those respondents who had seen the plans, over half of them were satisfied with the plans for sustainability (53%), venues and sporting facilities (62%), retail and shopping facilities (65%), transport infrastructure and services (65%), leisure and cultural facilities (54%) and the Olympic Park and green spaces (64%). With generally less than 10% of respondents dissatisfied with any aspects of the plans. Only 36% of respondents were satisfied with the plans for education, health and community facilities – a finding that is consistent with respondent's views on the extent to which the 2012 Games will impact on these facilities in the local area (see Figure C-38).

**Figure C-38: Satisfaction with the plans for the Olympic Park and surrounding area after the Games**

